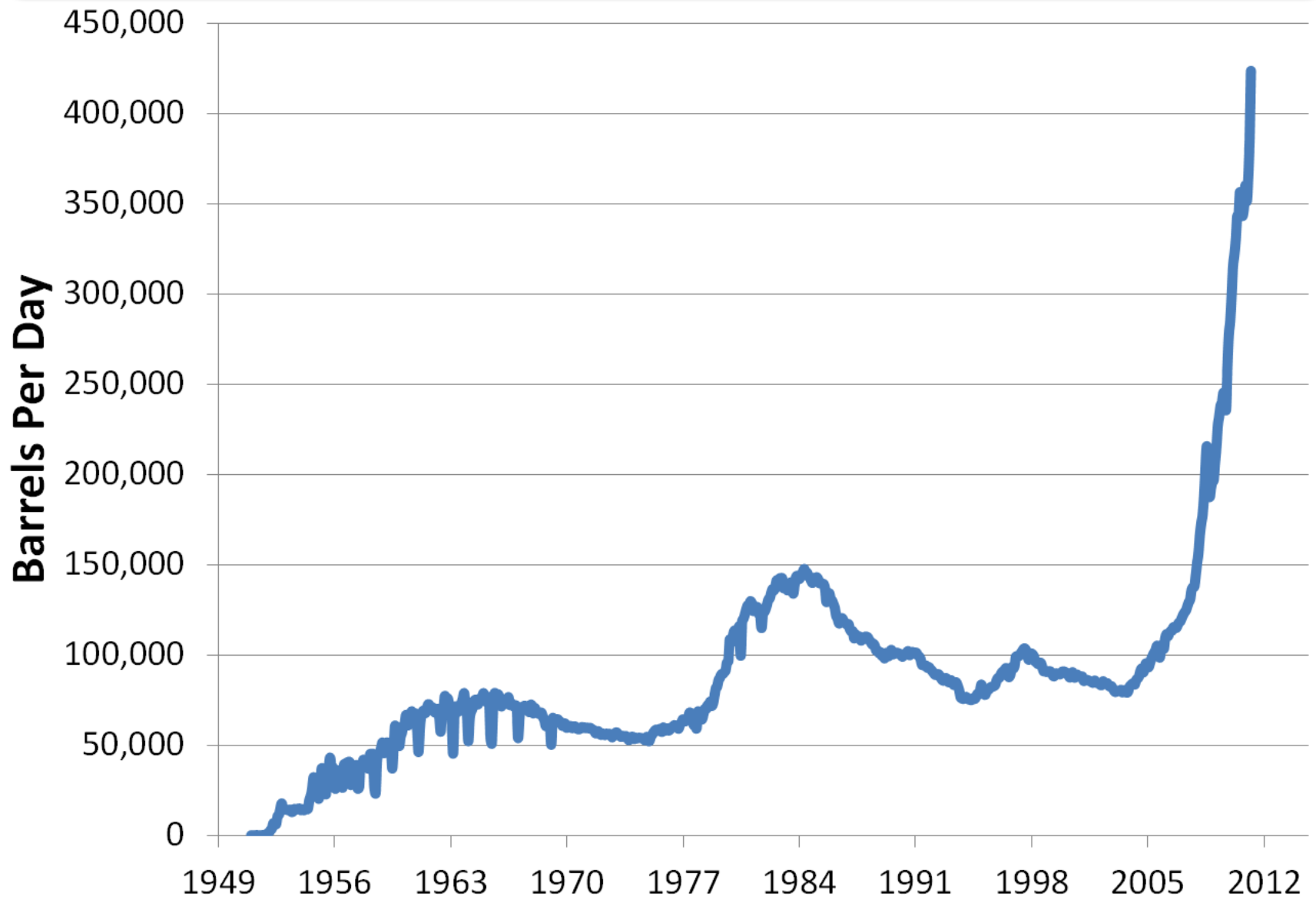


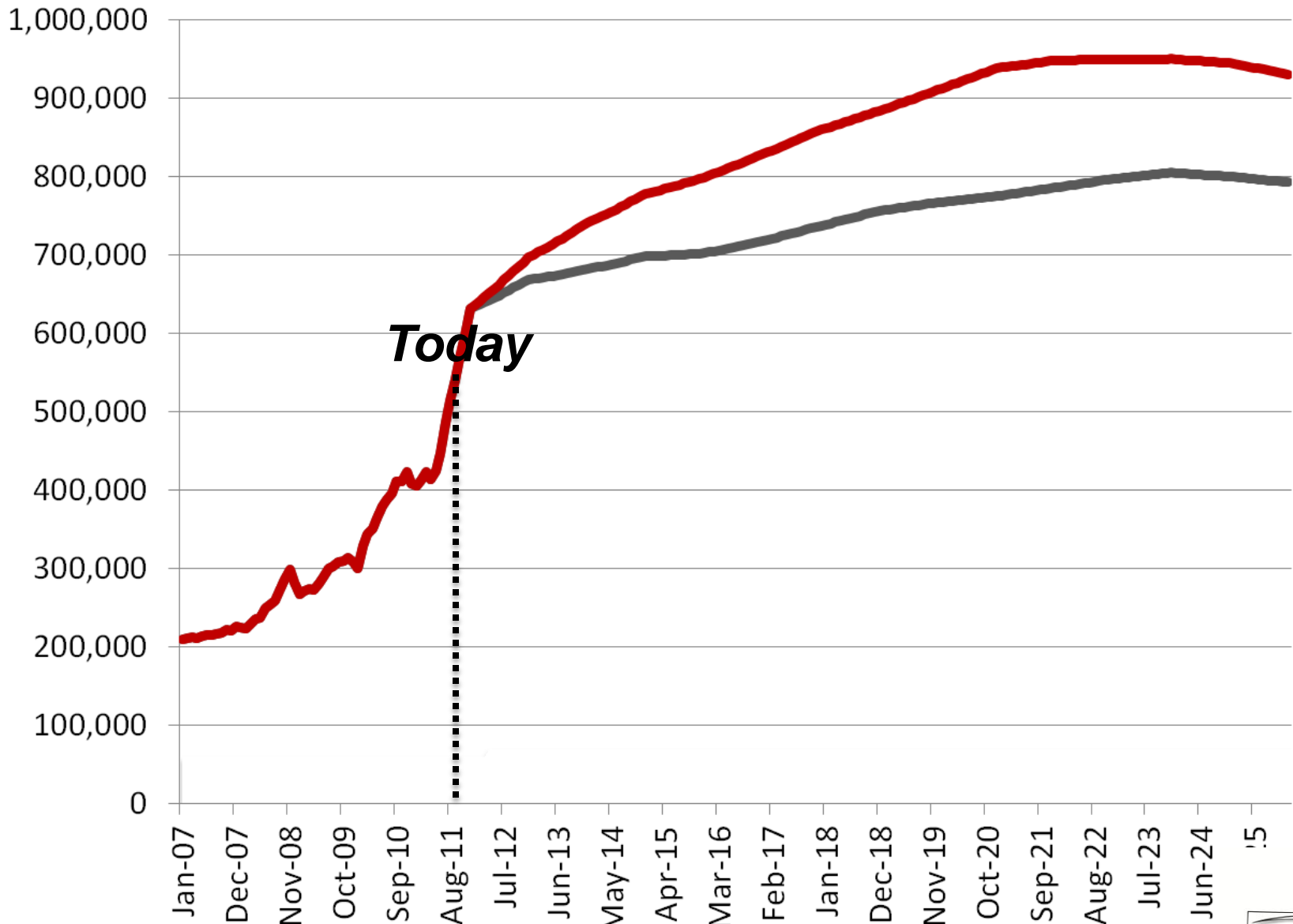


North Dakota Pipeline Authority
ND Petroleum Council Annual Meeting
Justin J. Kringstad
September 21, 2011 – Medora, ND

North Dakota Crude Oil



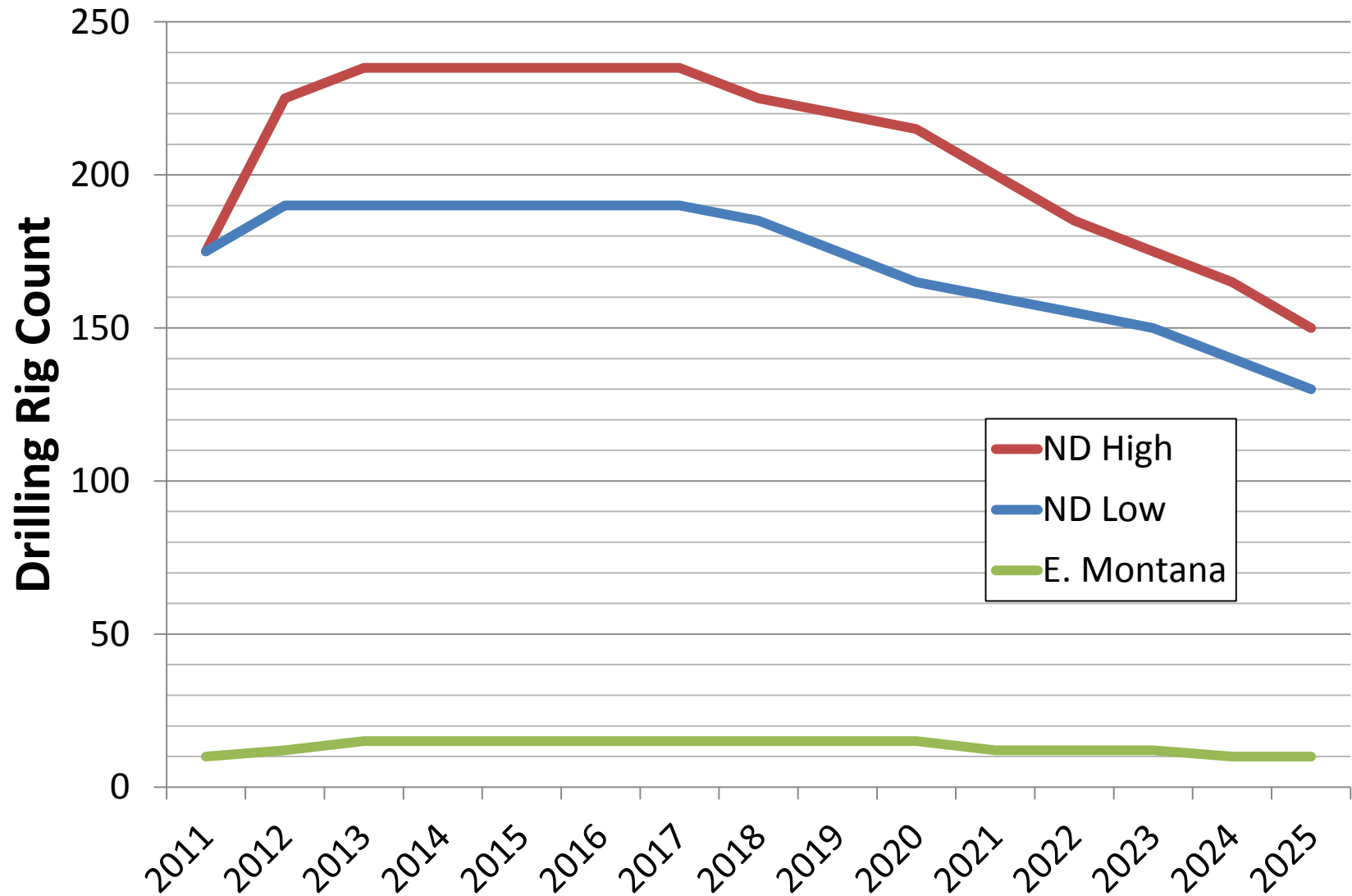
Forecasting Williston Basin Oil Production, BOPD



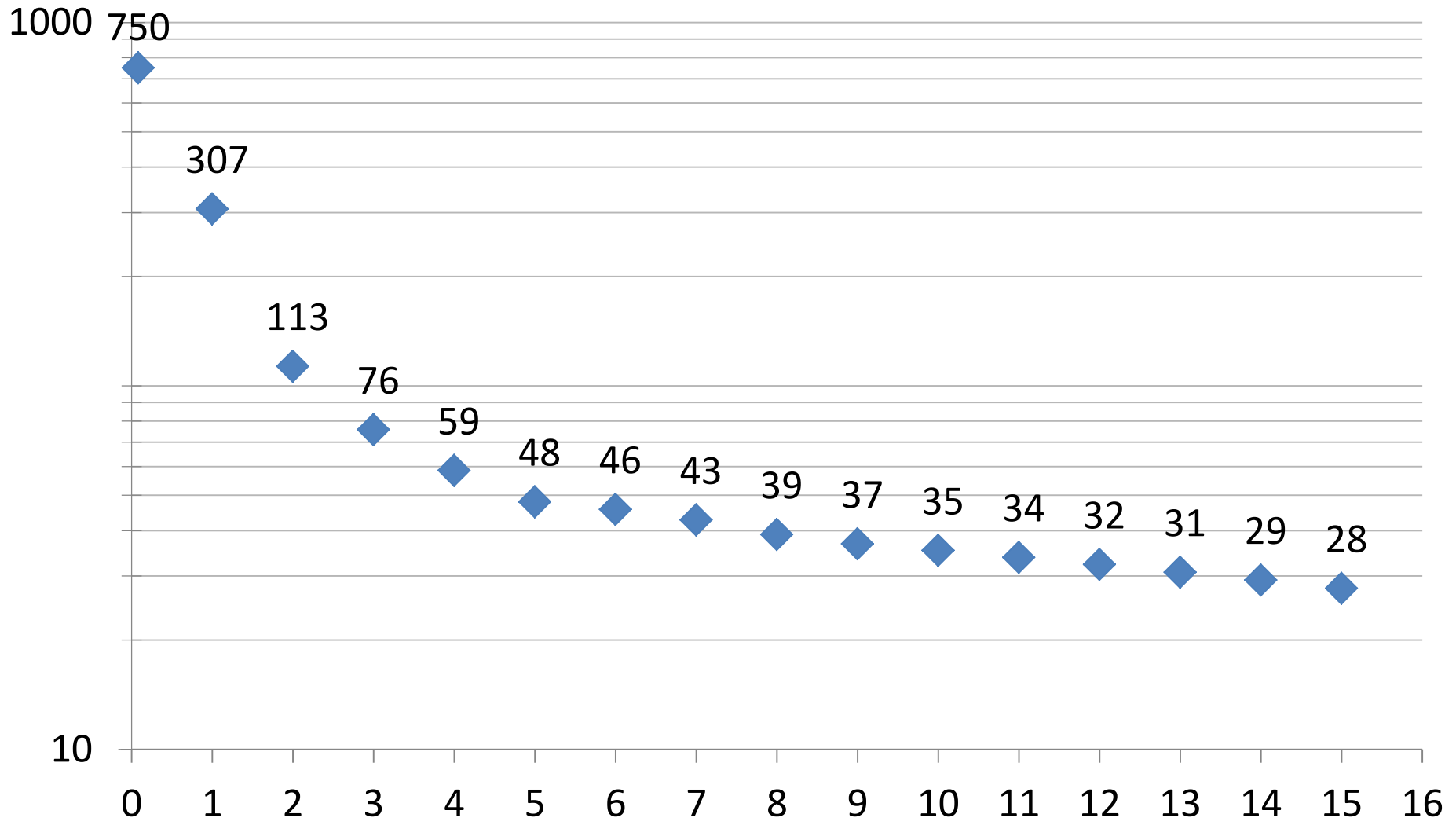
Production forecast is for visual demonstration purposes only and should not be considered accurate for any near or long term planning.



Forecast Drivers...

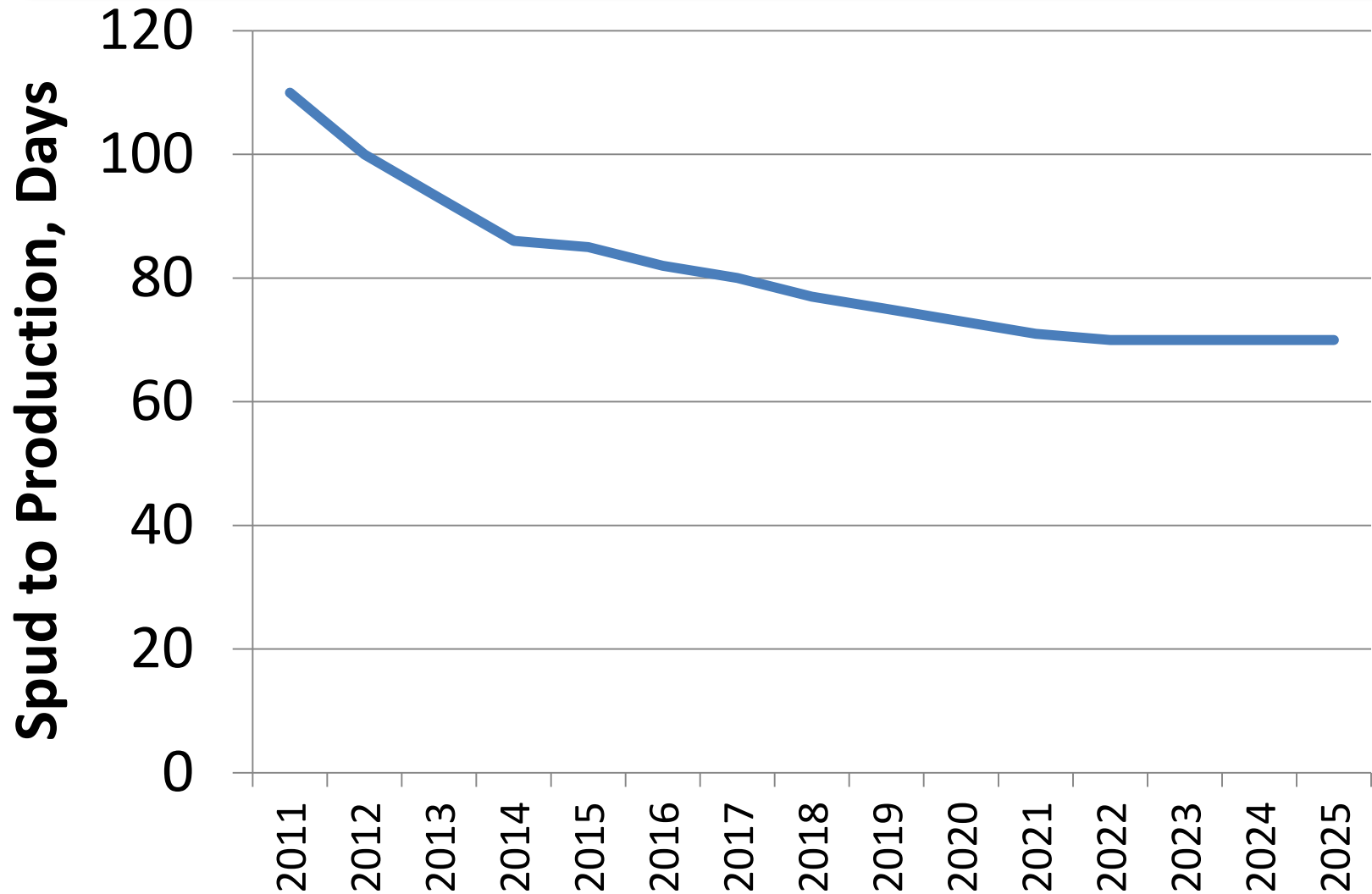


Forecast Drivers...

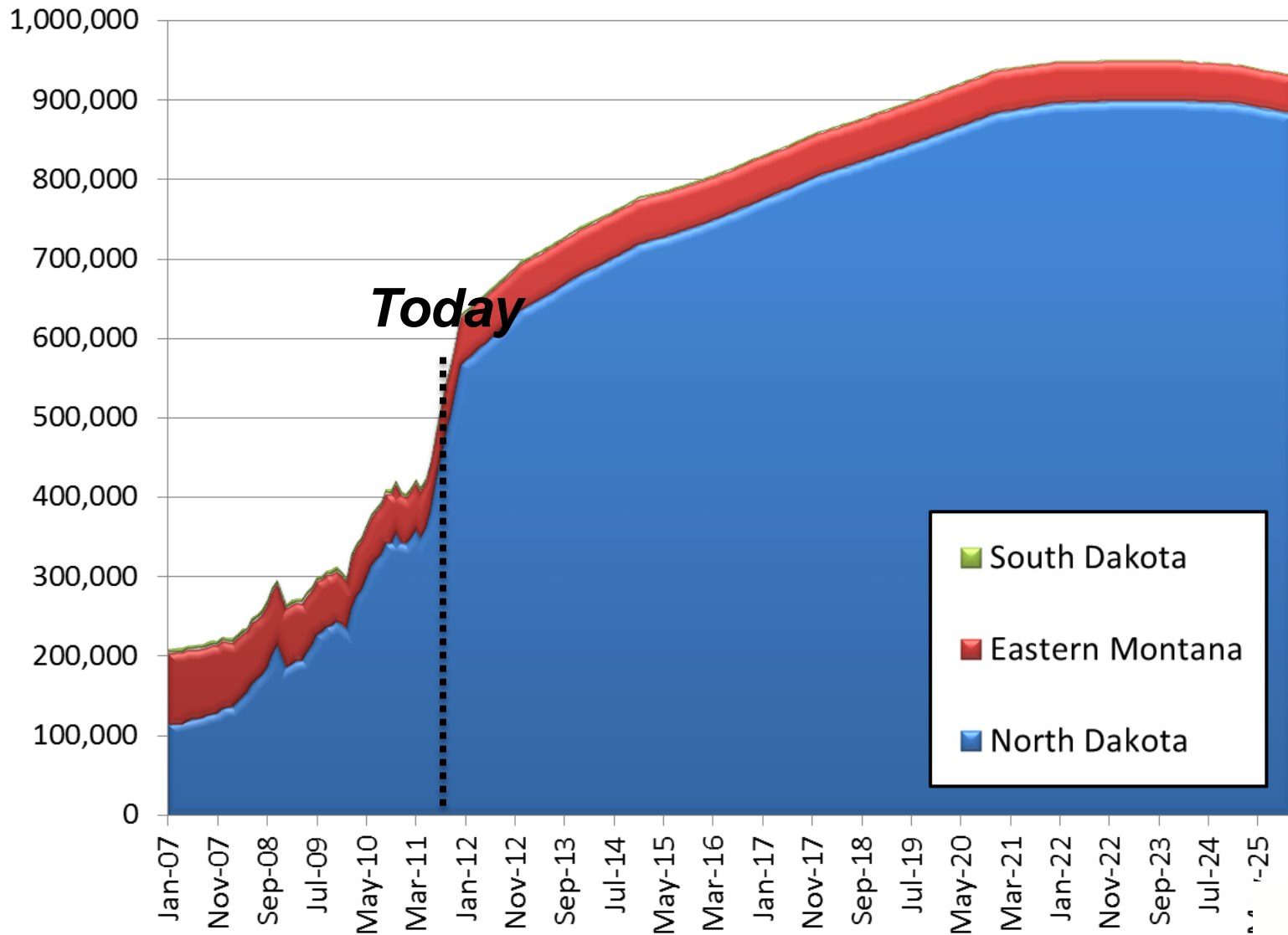


Assumption for North Dakota Average Yearly Production, BOPD

Forecast Drivers...



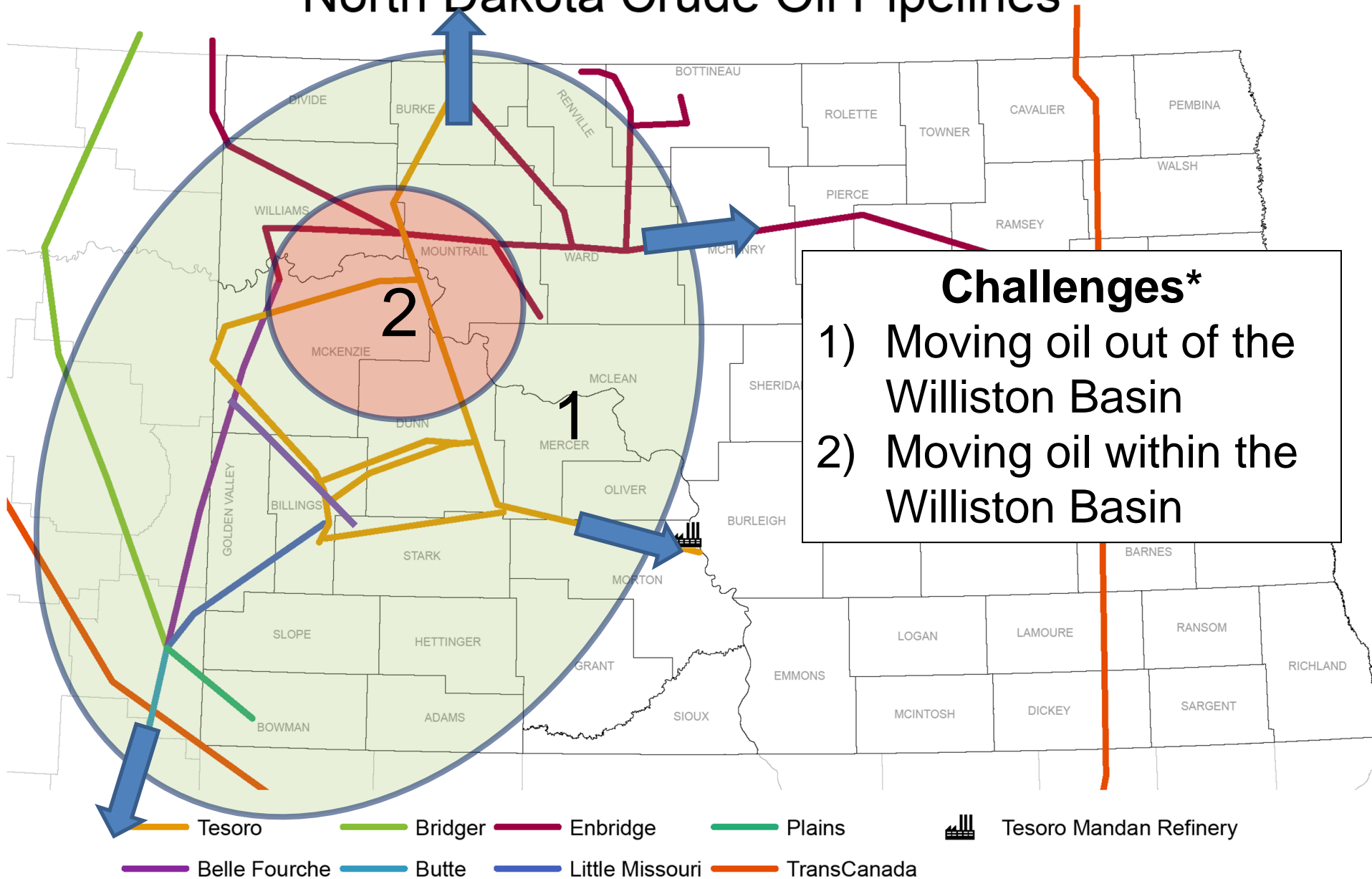
Forecasting Williston Basin Oil Production, BOPD



Production forecast is for visual demonstration purposes only and should not be considered accurate for any near or long term planning.

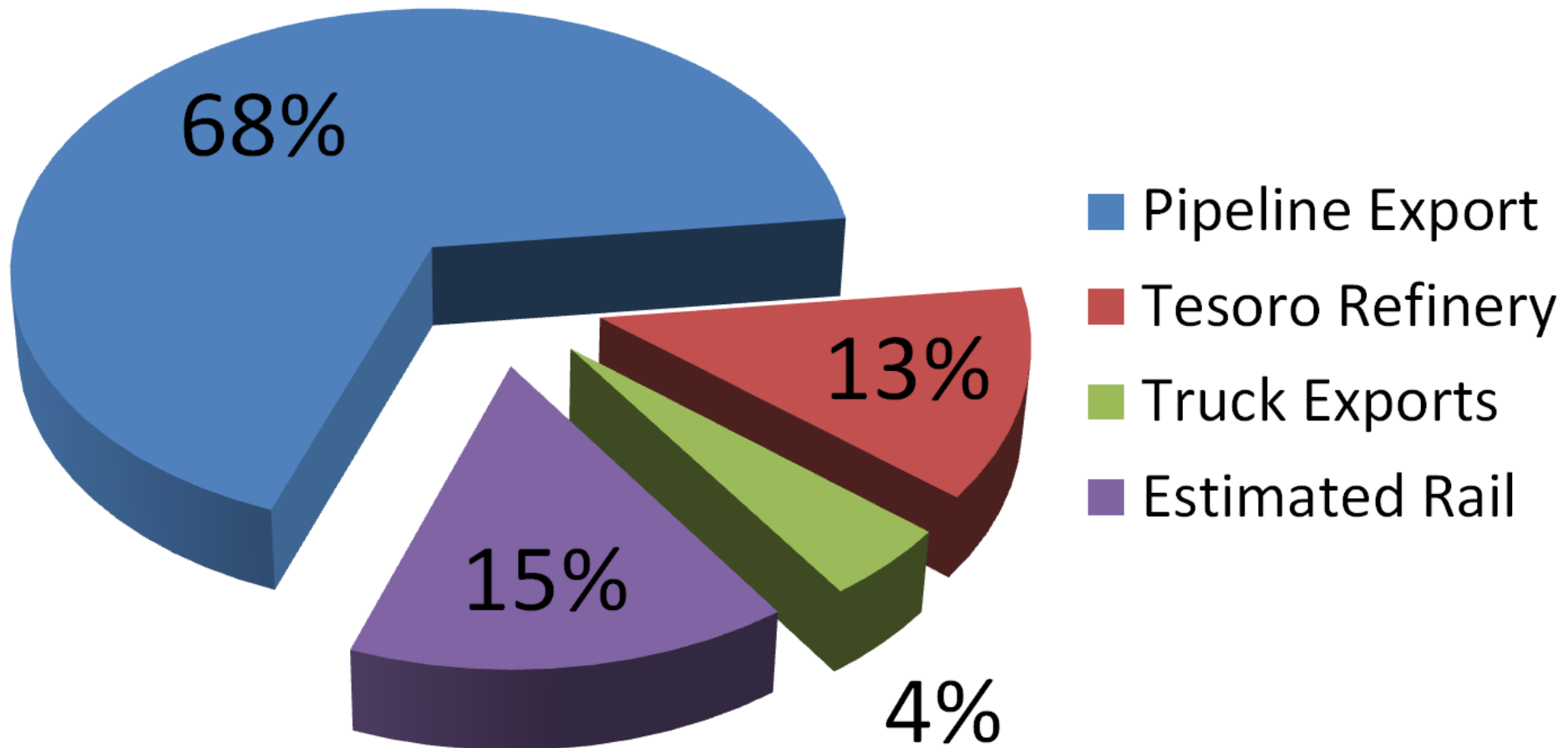


North Dakota Crude Oil Pipelines



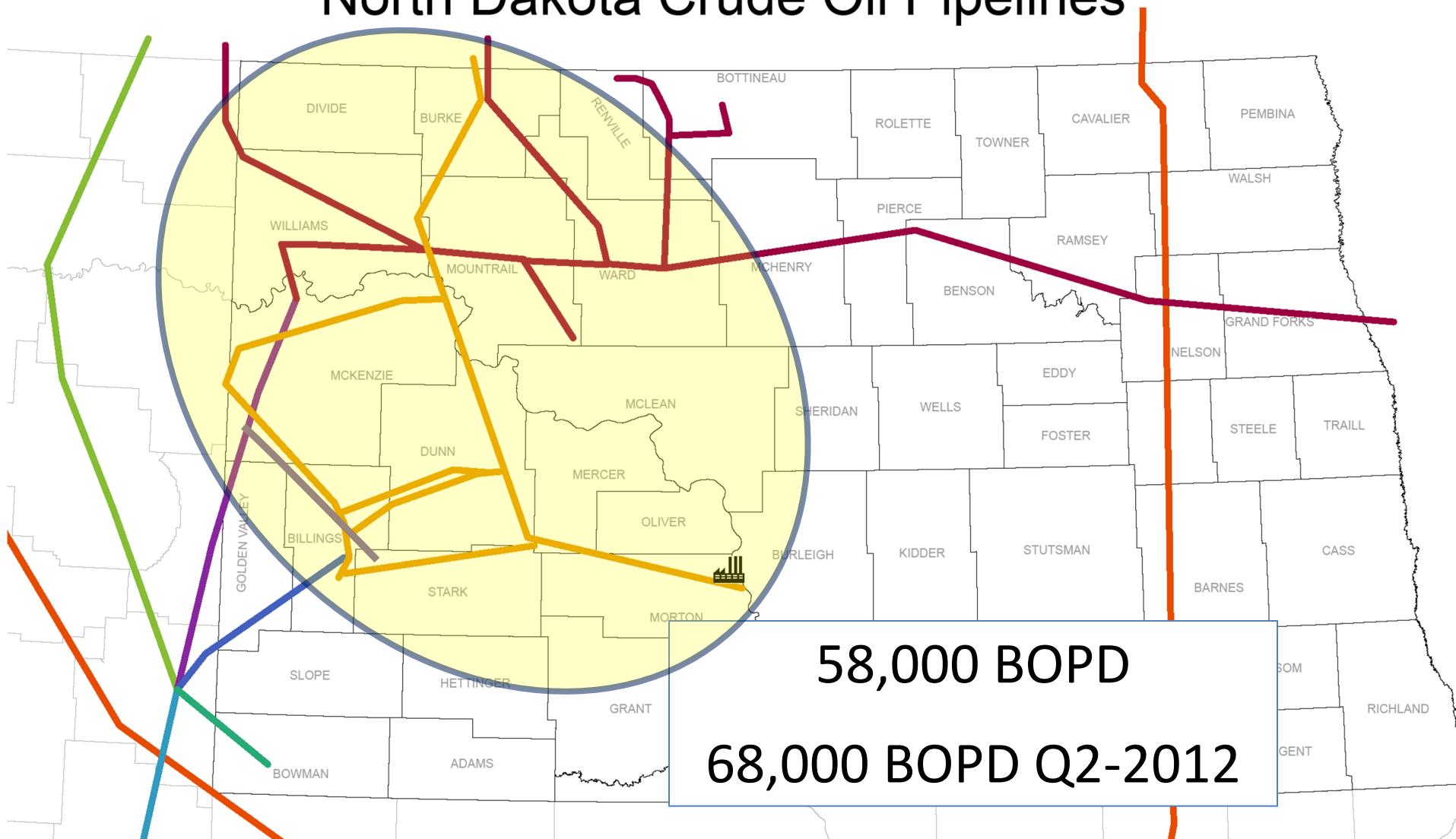
*Modified from Bridger and Belle Fourche Pipelines

Williston Basin Oil Transportation



June 2011 Data

North Dakota Crude Oil Pipelines



— Tesoro
 — Bridger
 — Enbridge
 — Plains
  Tesoro Mandan Refinery
— Belle Fourche
— Butte
— Little Missouri
— TransCanada

North Dakota Crude Oil Pipelines

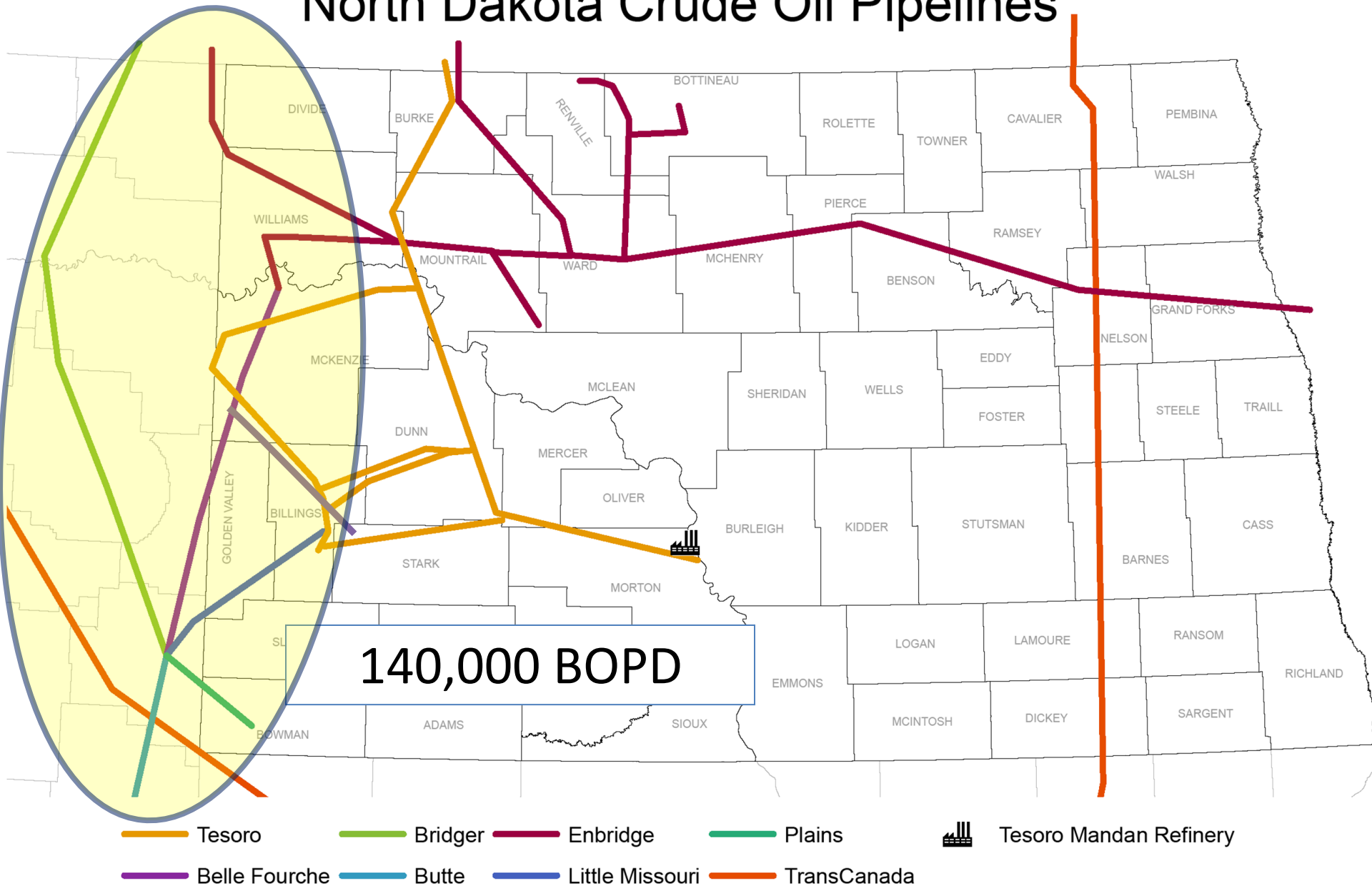
25,000 BOPD

185,000 BOPD

210,000 BOPD Q4 2011

— Tesoro — Bridger — Enbridge — Plains —  Tesoro Mandan Refinery
— Belle Fourche — Butte — Little Missouri — TransCanada

North Dakota Crude Oil Pipelines



Current Rail Transportation

EOG – Stanley, ND



Others Include:

Minot

Dore

Stampede

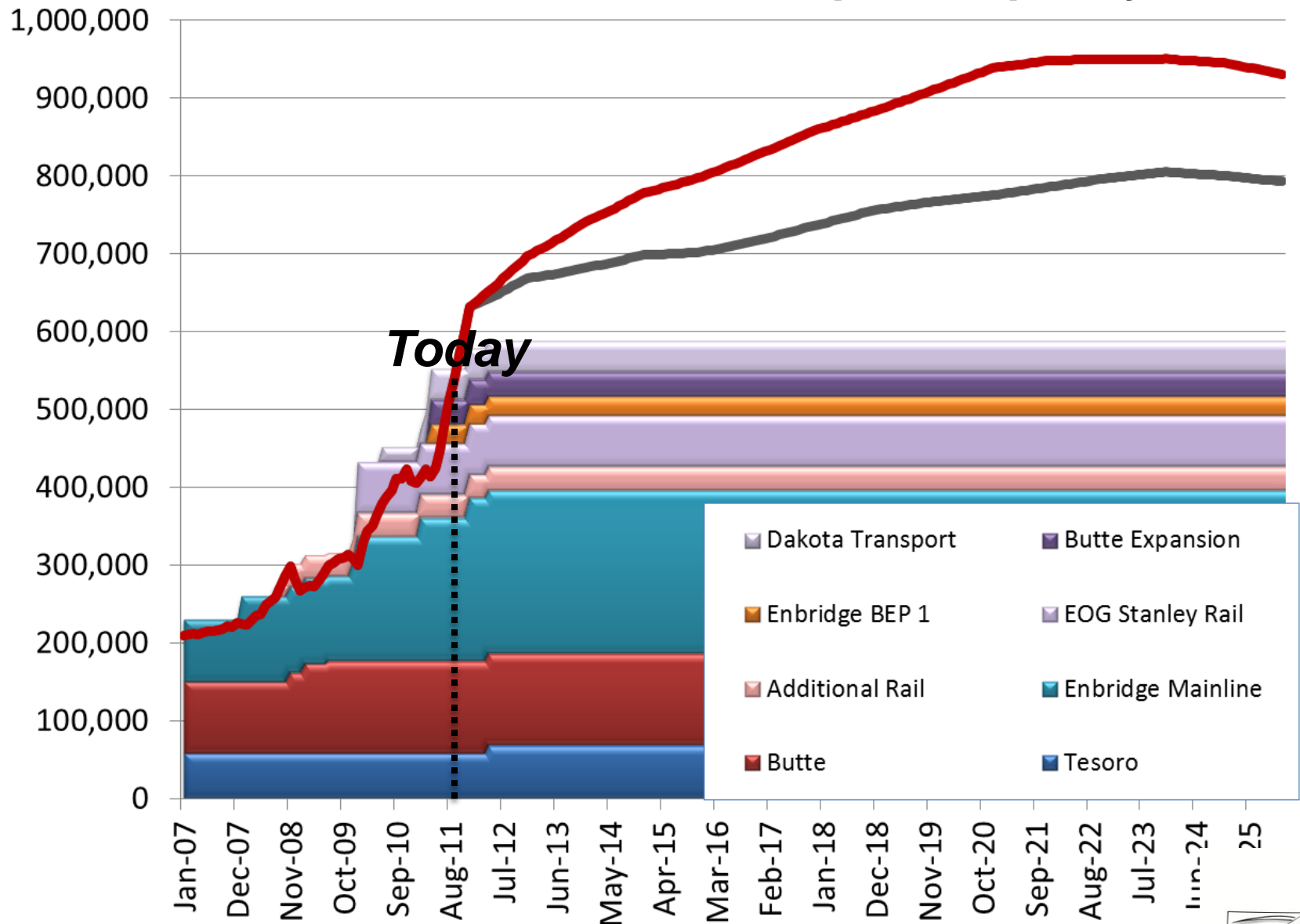
Donnybrook



Dakota Transport Solutions – New Town, ND

**Images Provided By:
Loren Kopseng**

Williston Basin Oil Production & Export Capacity, BOPD



Production forecast is for visual demonstration purposes only and should not be considered accurate for any near or long term planning.



Several Exciting Developments For Post 2010 Crude Oil Transport

Enbridge Bakken Expansion Program

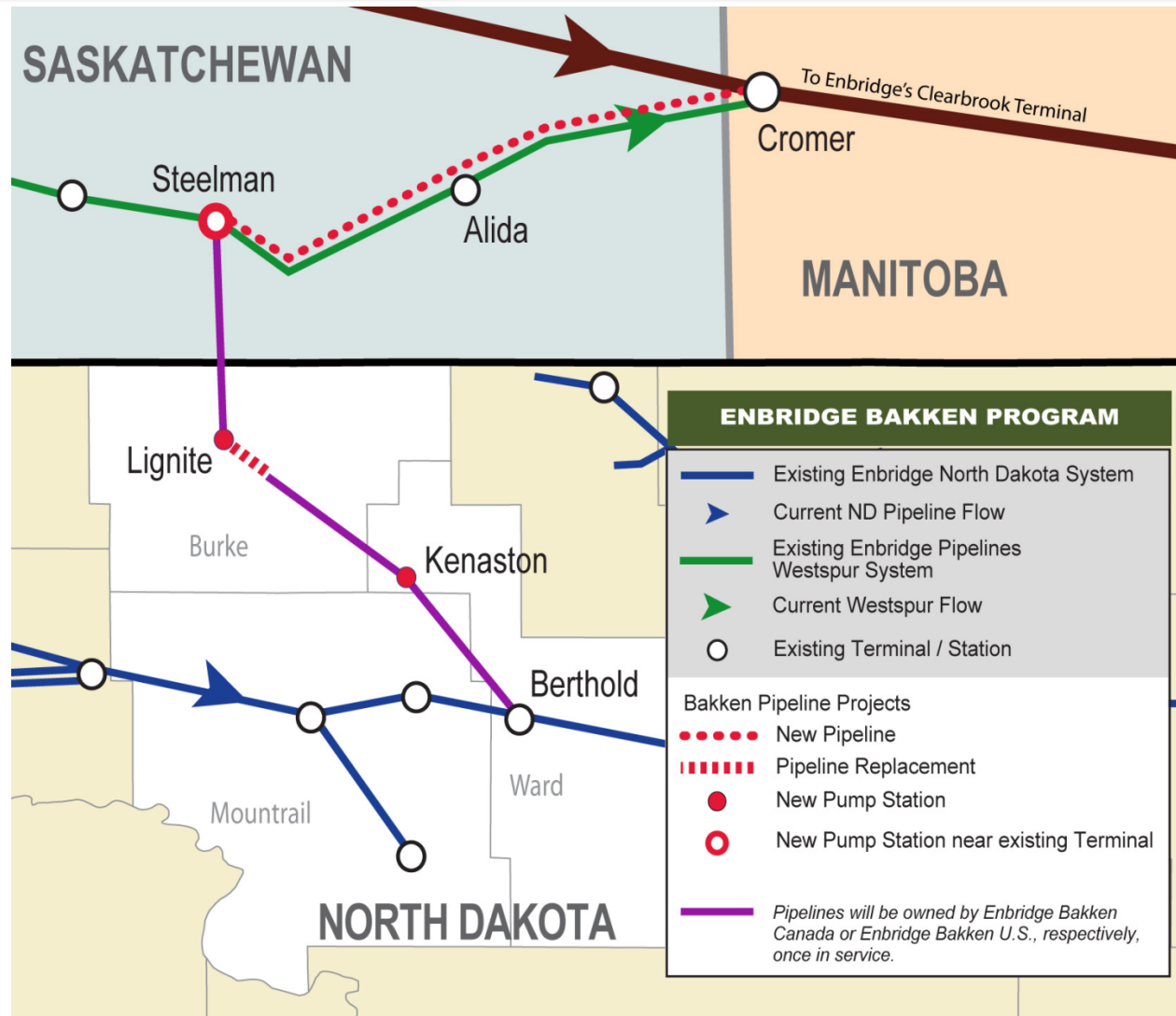
Keystone XL Marketlink

True Co.'s Baker 300

Plains Bakken North

Unit Train Development

Enbridge Bakken Pipeline Expansion



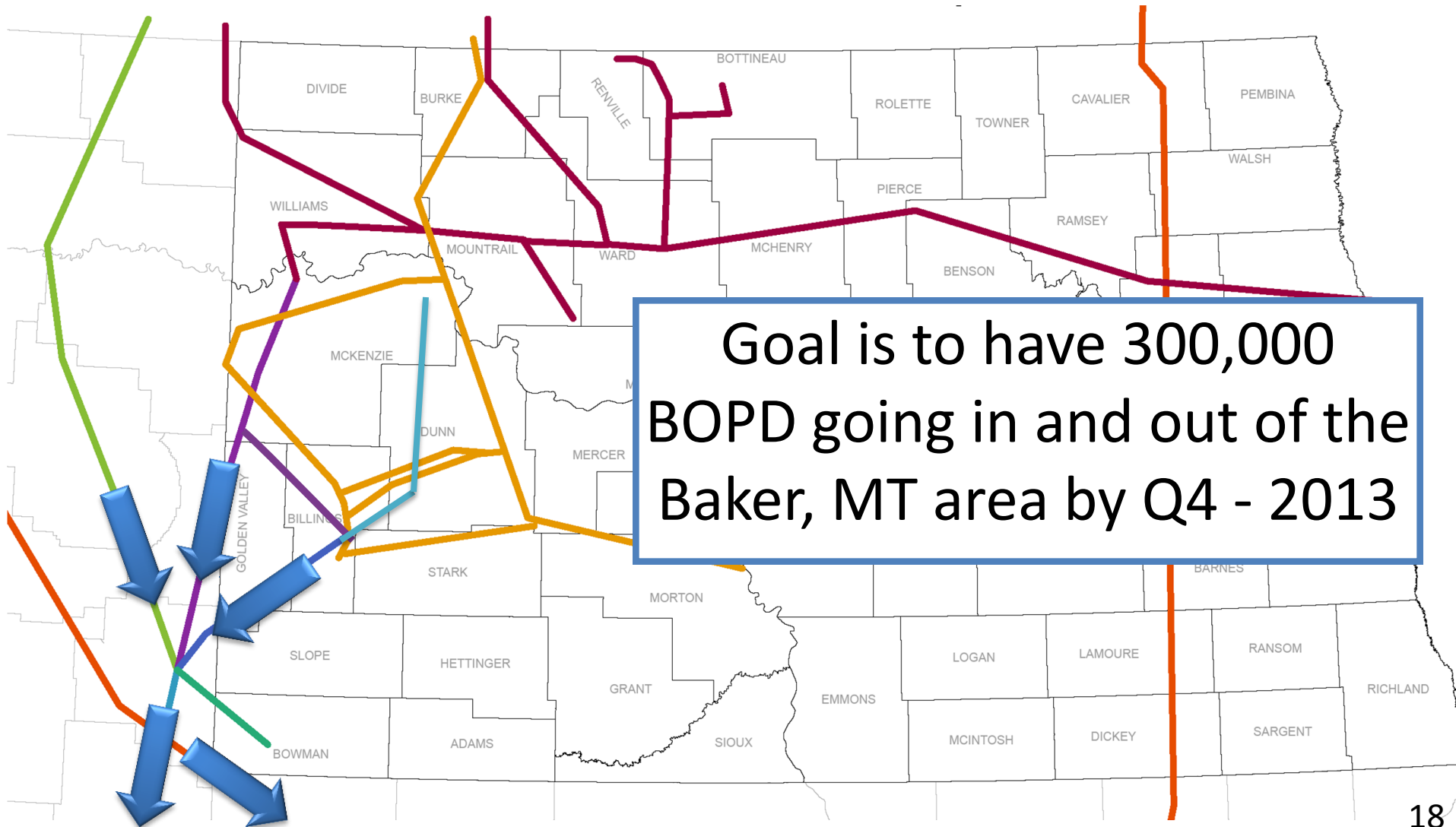
Proposed TransCanada Marketlink

- Successful Open Season in 2010
- Late 2013 Startup (Subject to Presidential Permit)

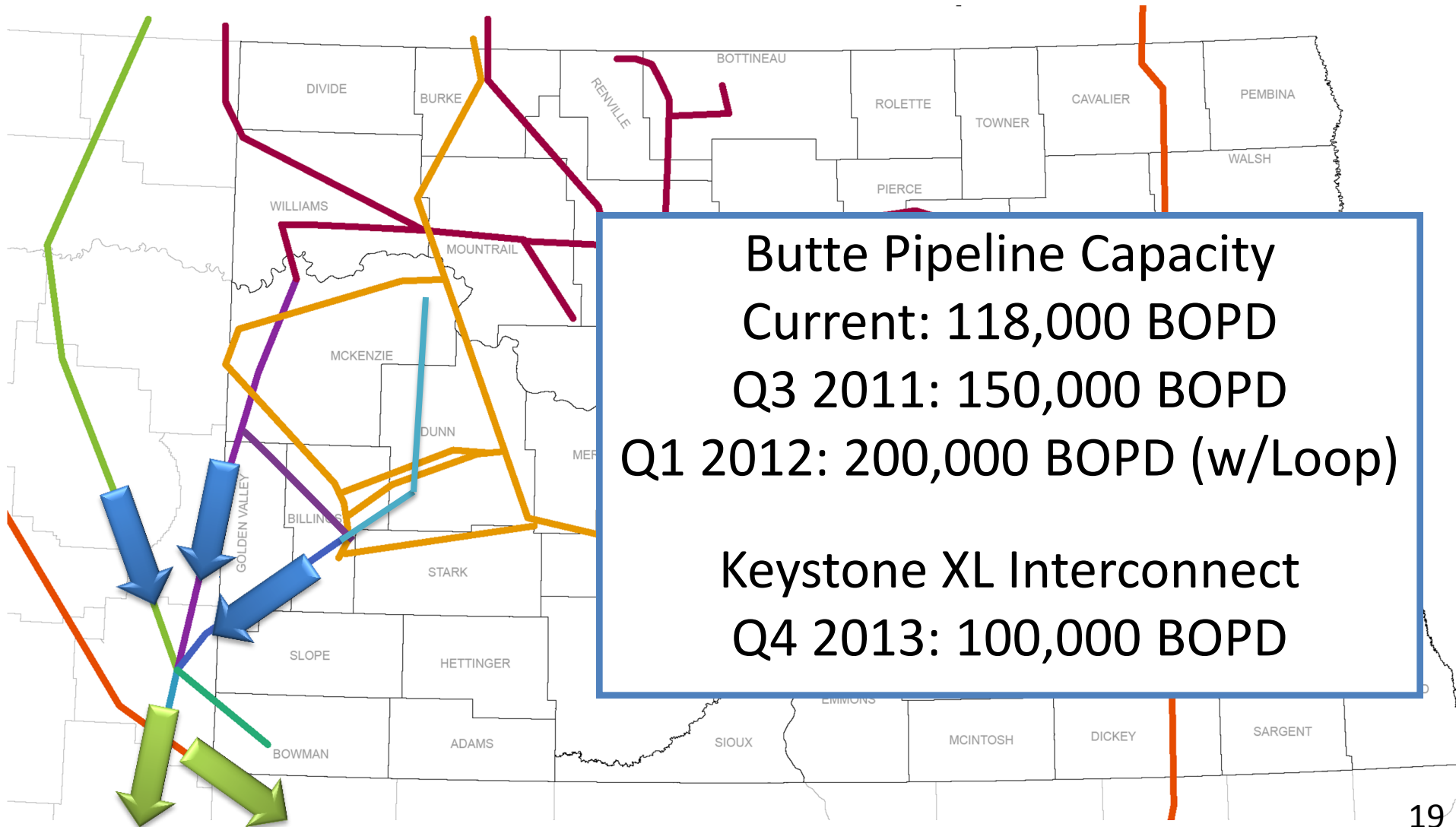
Image: TransCanada Notice of Open Season



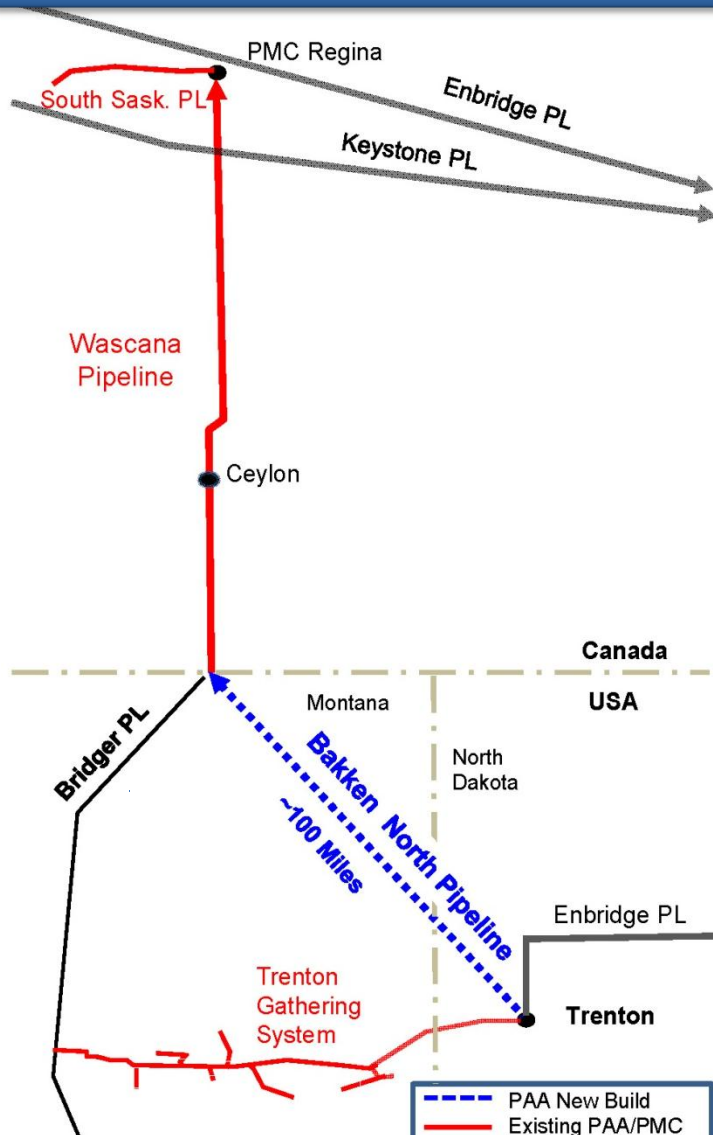
True Co.'s Proposed "Baker 300"



True Co.'s Proposed "Baker 300"



Plains Bakken North Pipeline

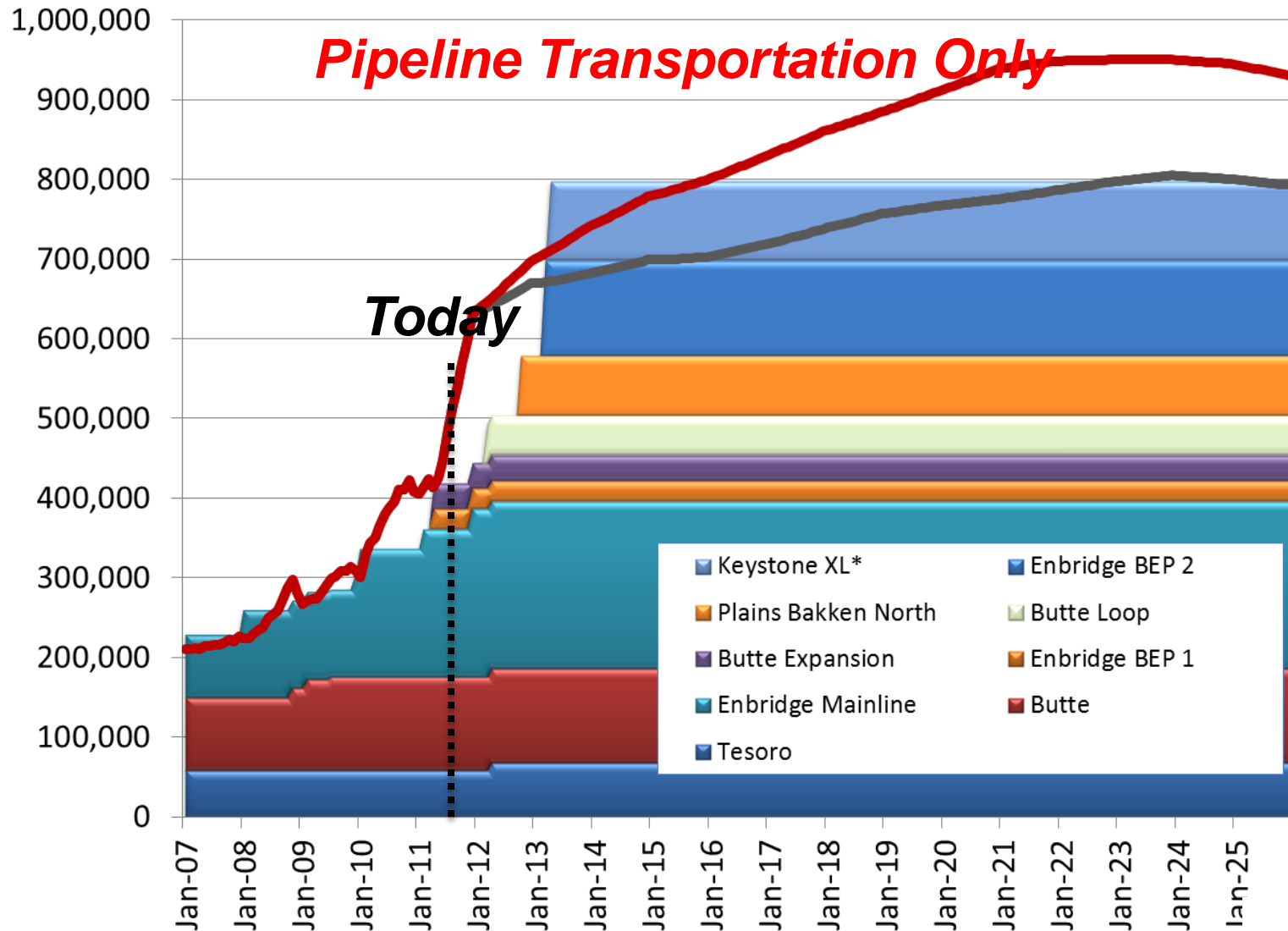


Proposed Capacity
50,000-75,000 BOPD
Q4 2012

New 103 Miles, 12" Pipeline
Reverse Wascana Pipeline

\$160-\$200 Million

Williston Basin Oil Production & Export Capacity, BOPD

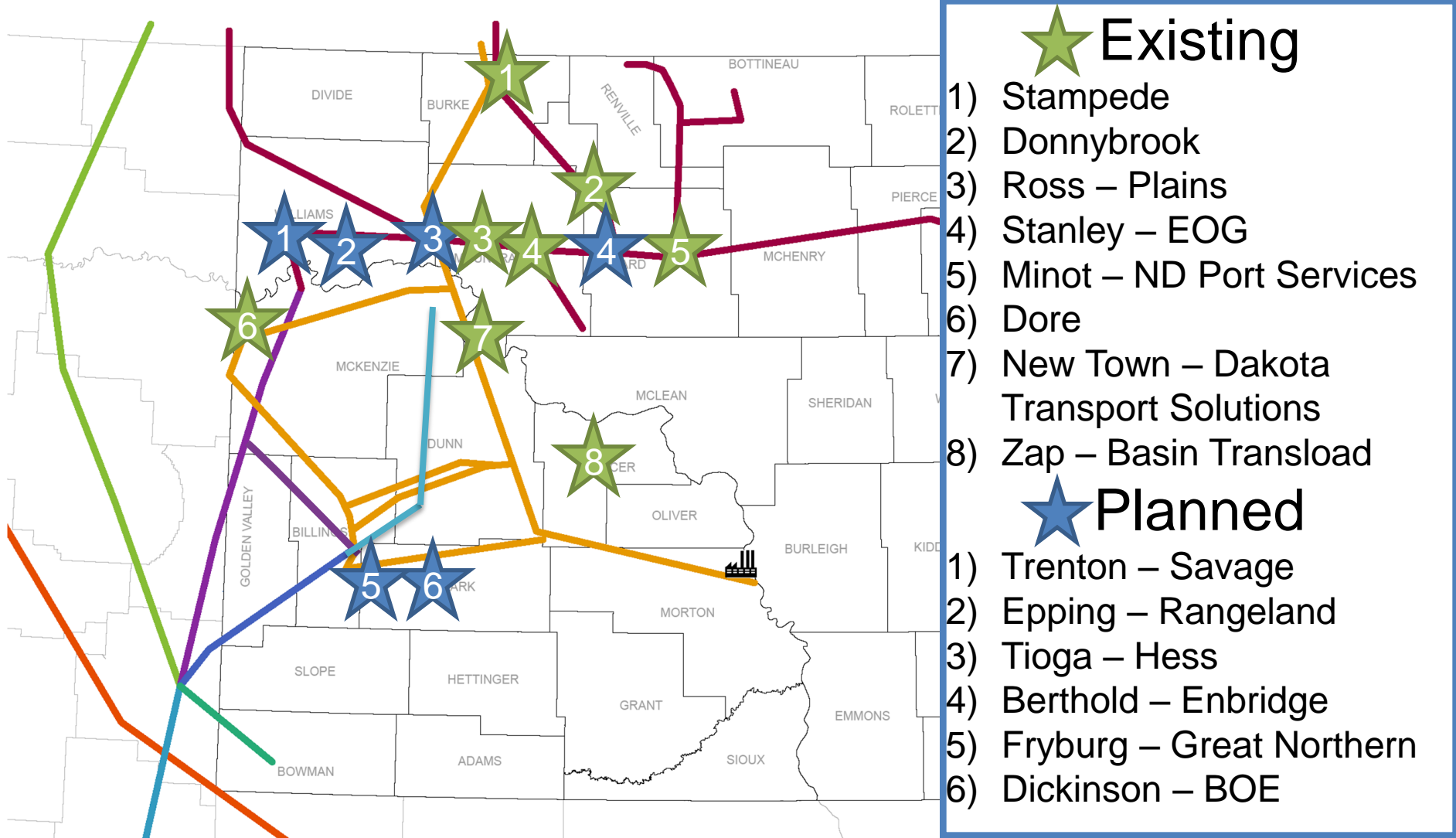


Production forecast is for visual demonstration purposes only and should not be considered accurate for any near or long term planning.

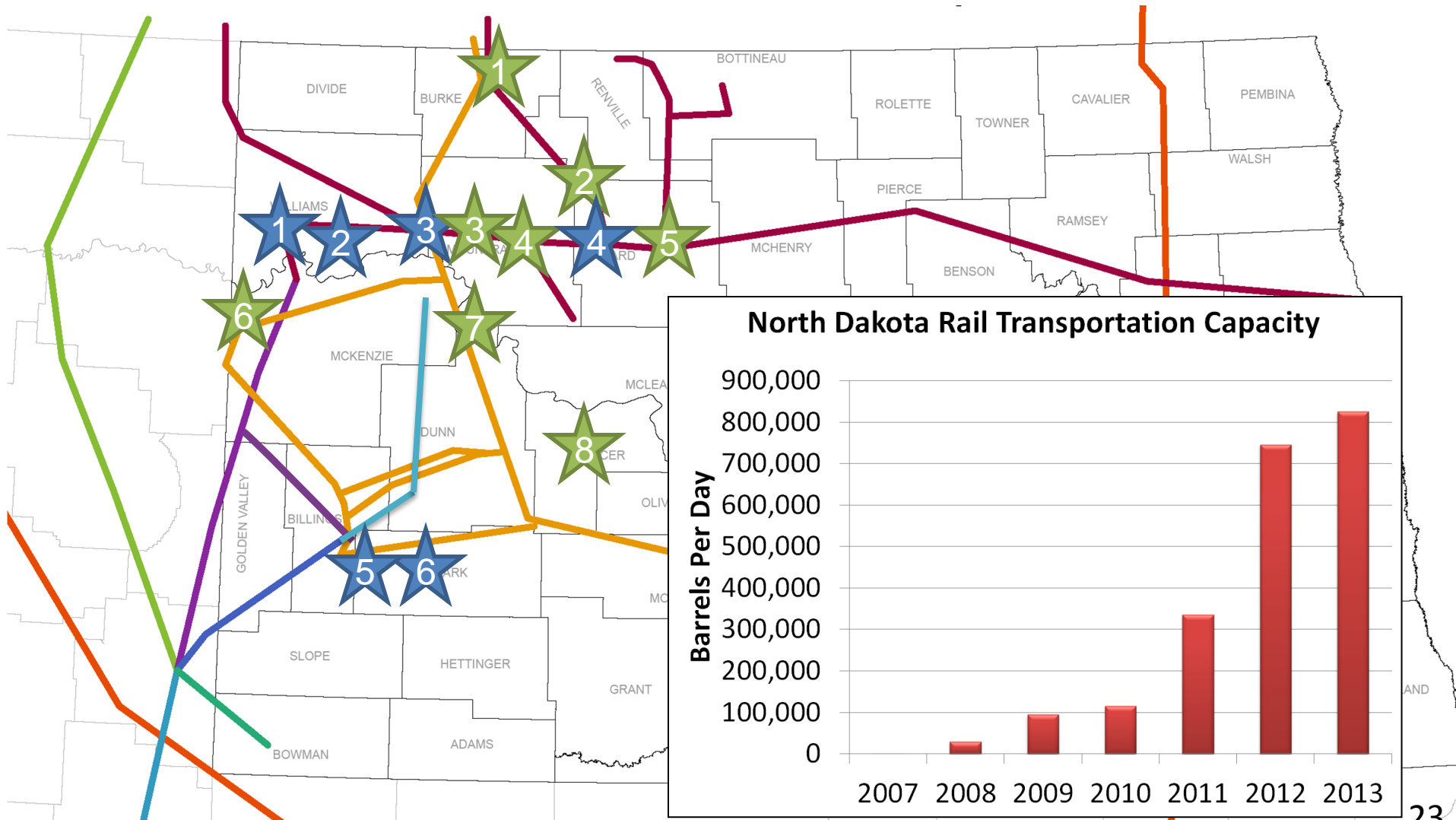
*Projects still in the proposed or internal review process



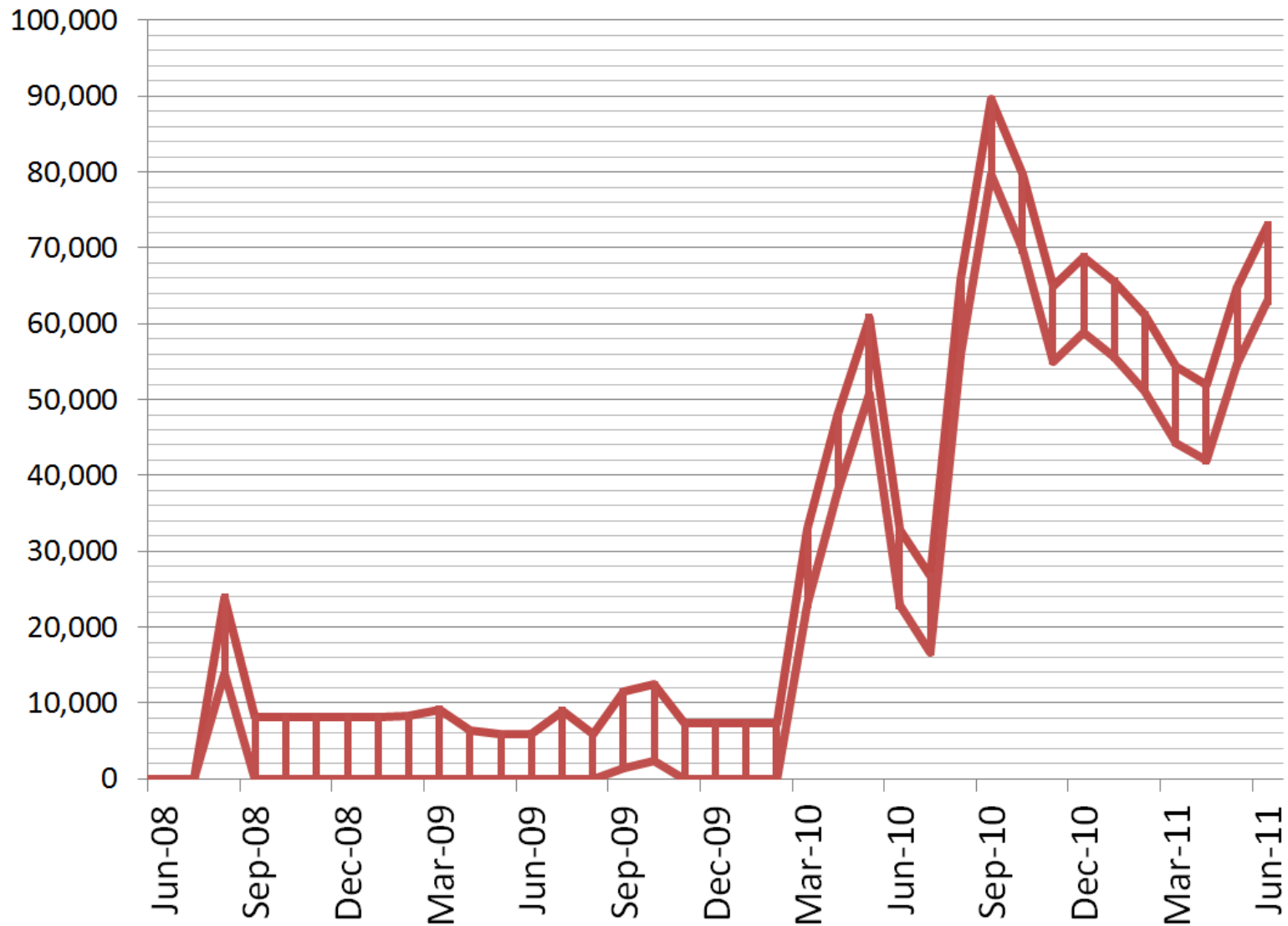
Existing & Planned Rail Locations



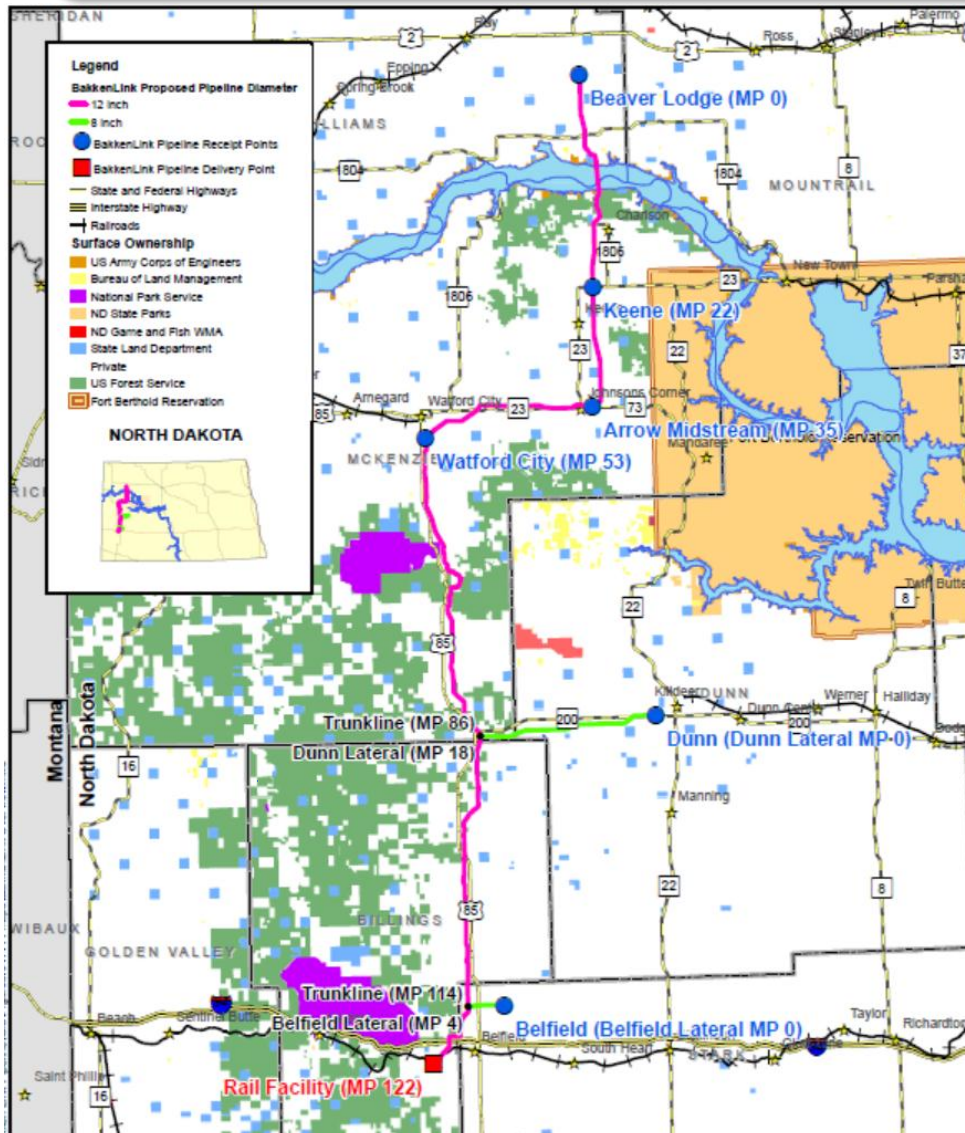
Existing & Planned Rail Locations



High-Low Rail Estimate



Quintana BakkenLink

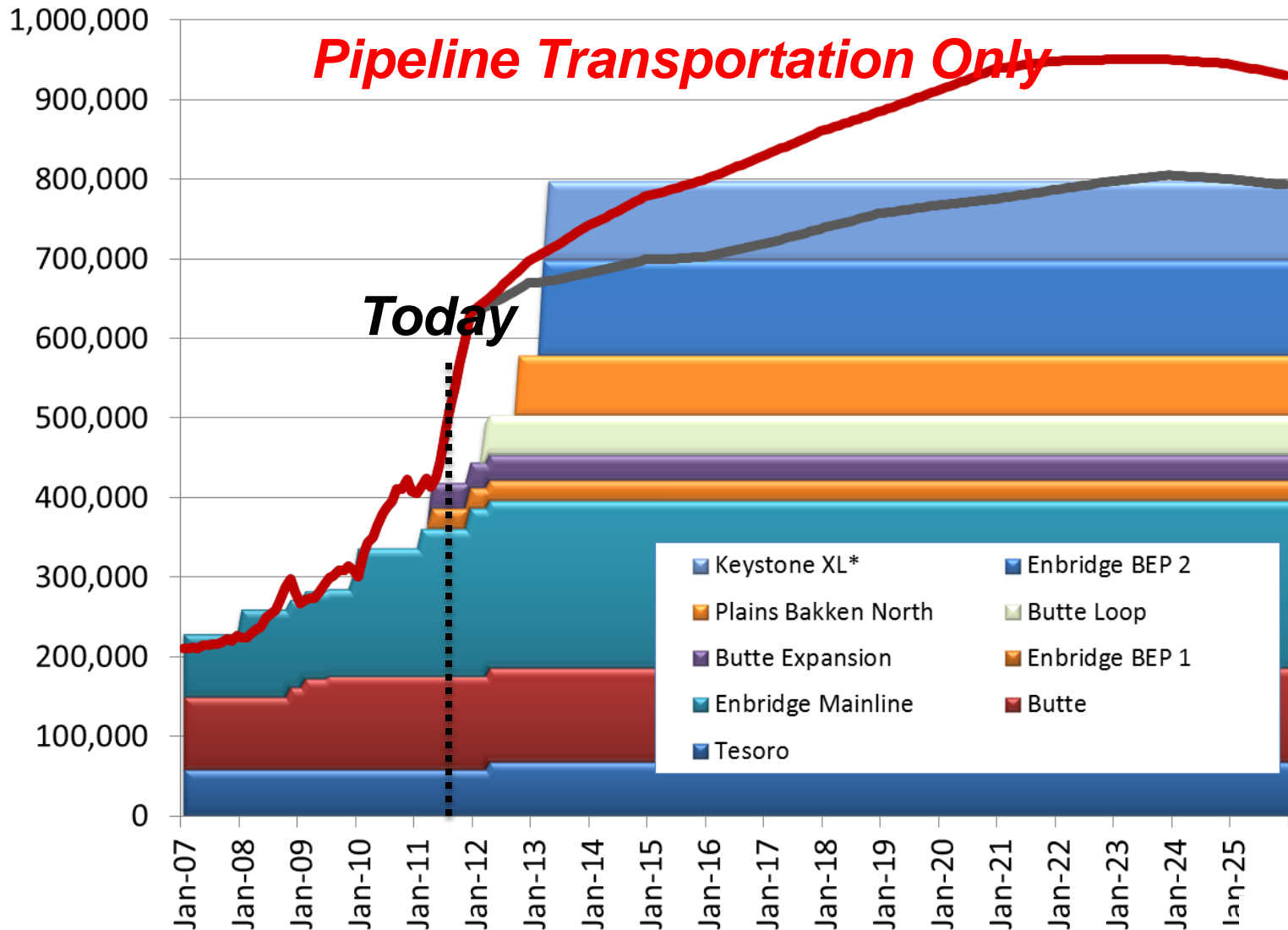


Proposed Startup:
Q3 – 2012

Size:
144 Miles, 8"-12"

Great Northern
Midstream -
Fryburg Rail Terminal
Capacity: 60,000 BOPD

Williston Basin Oil Production & Export Capacity, BOPD

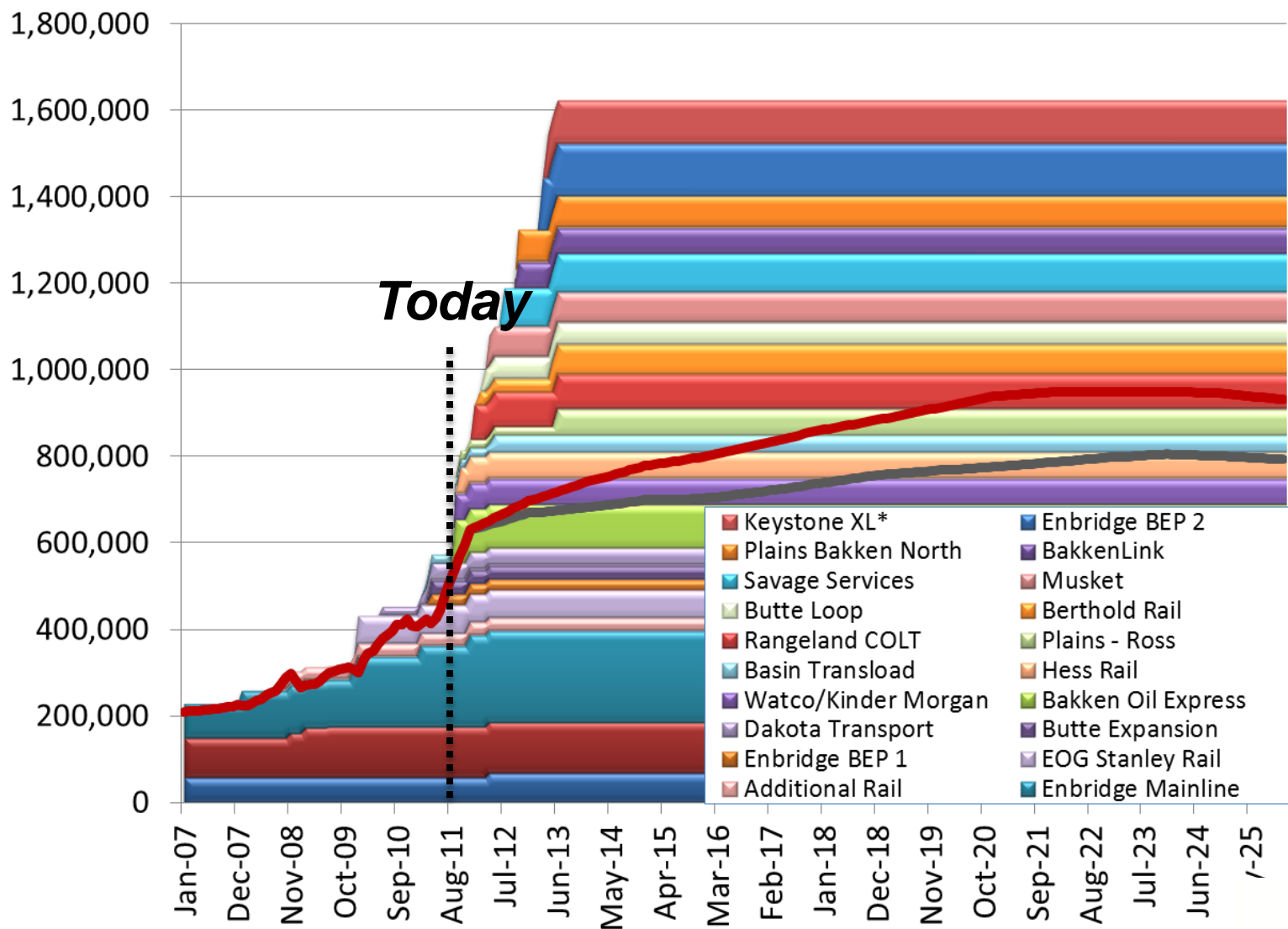


Production forecast is for visual demonstration purposes only and should not be considered accurate for any near or long term planning.

*Projects still in the proposed or internal review process



Williston Basin Oil Production & Export Capacity, BOPD

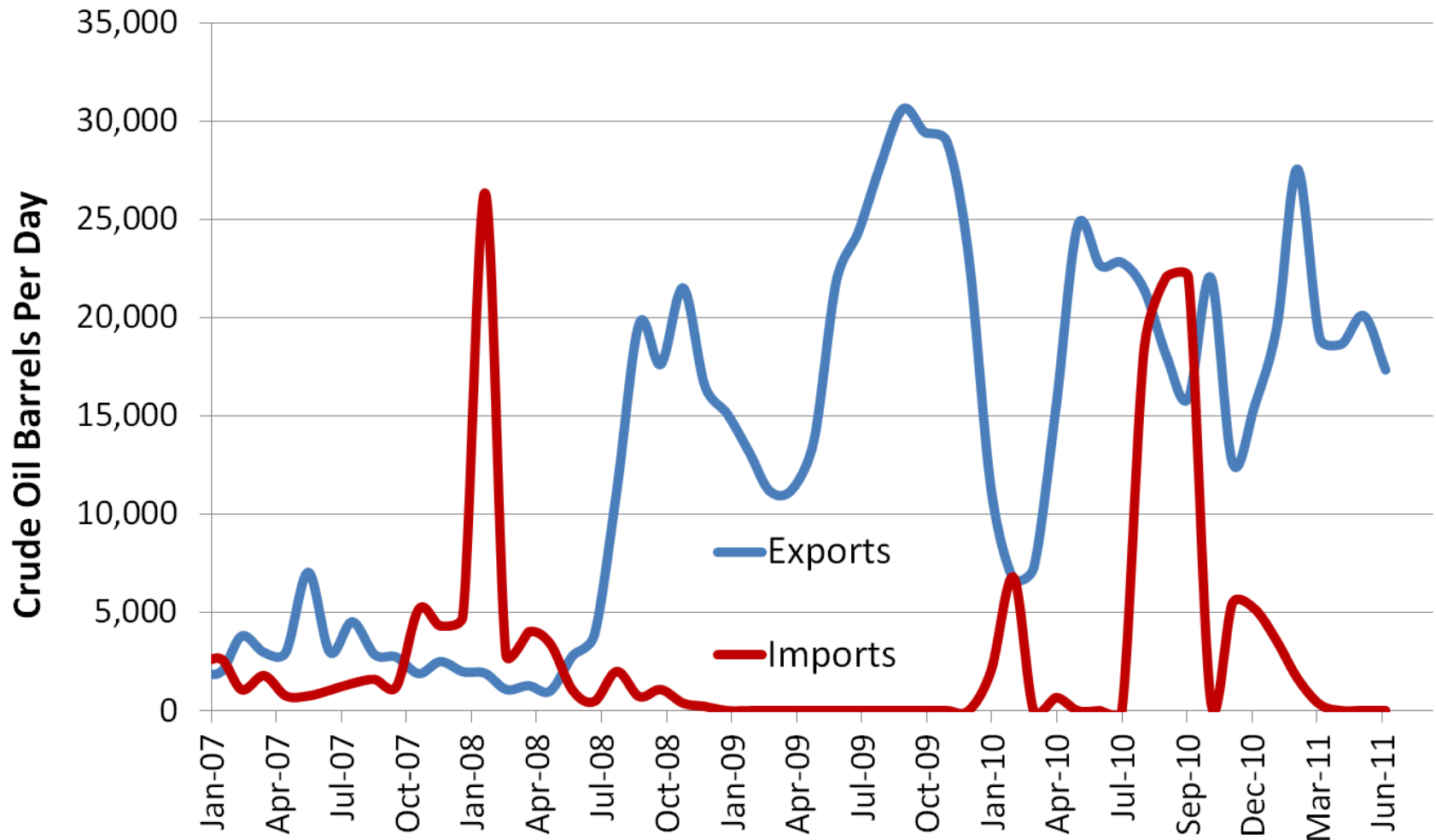


Production forecast is for visual demonstration purposes only and should not be considered accurate for any near or long term planning.

*Projects still in the proposed or internal review process

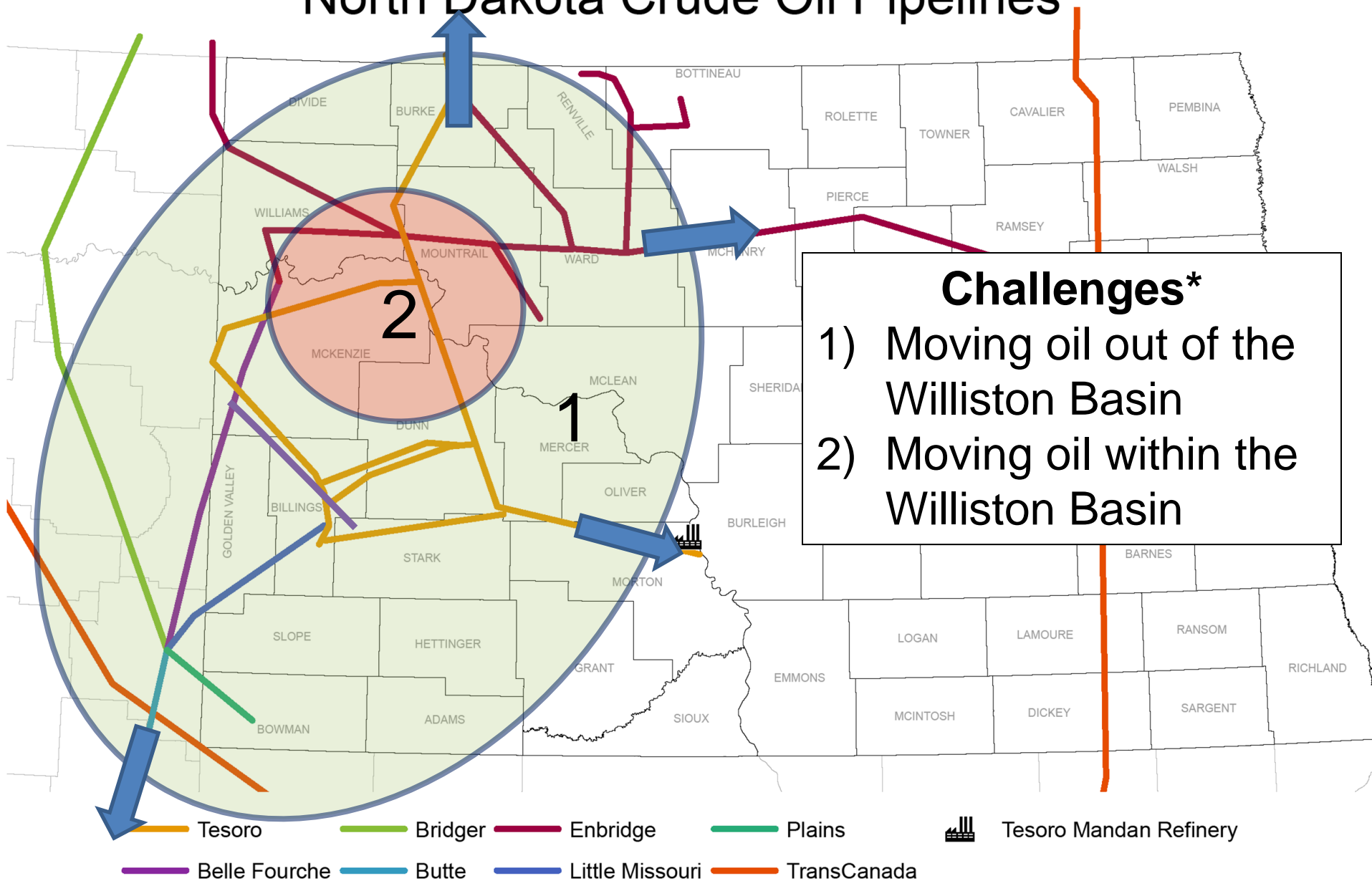


Williston Basin Truck Imports/Exports



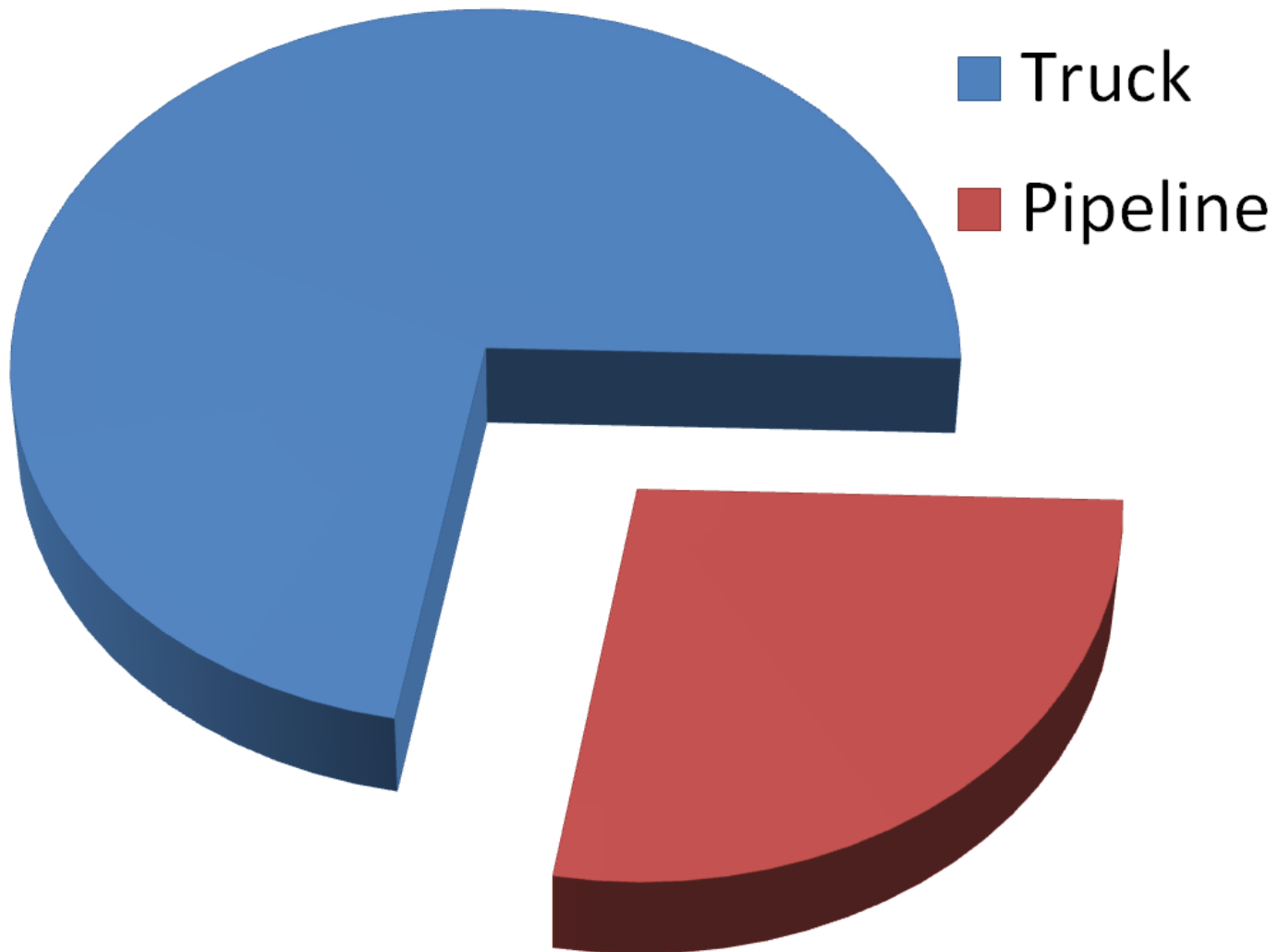
Information collected through the United States International Trade Commission's *Interactive Tariff and Trade DataWeb*

North Dakota Crude Oil Pipelines

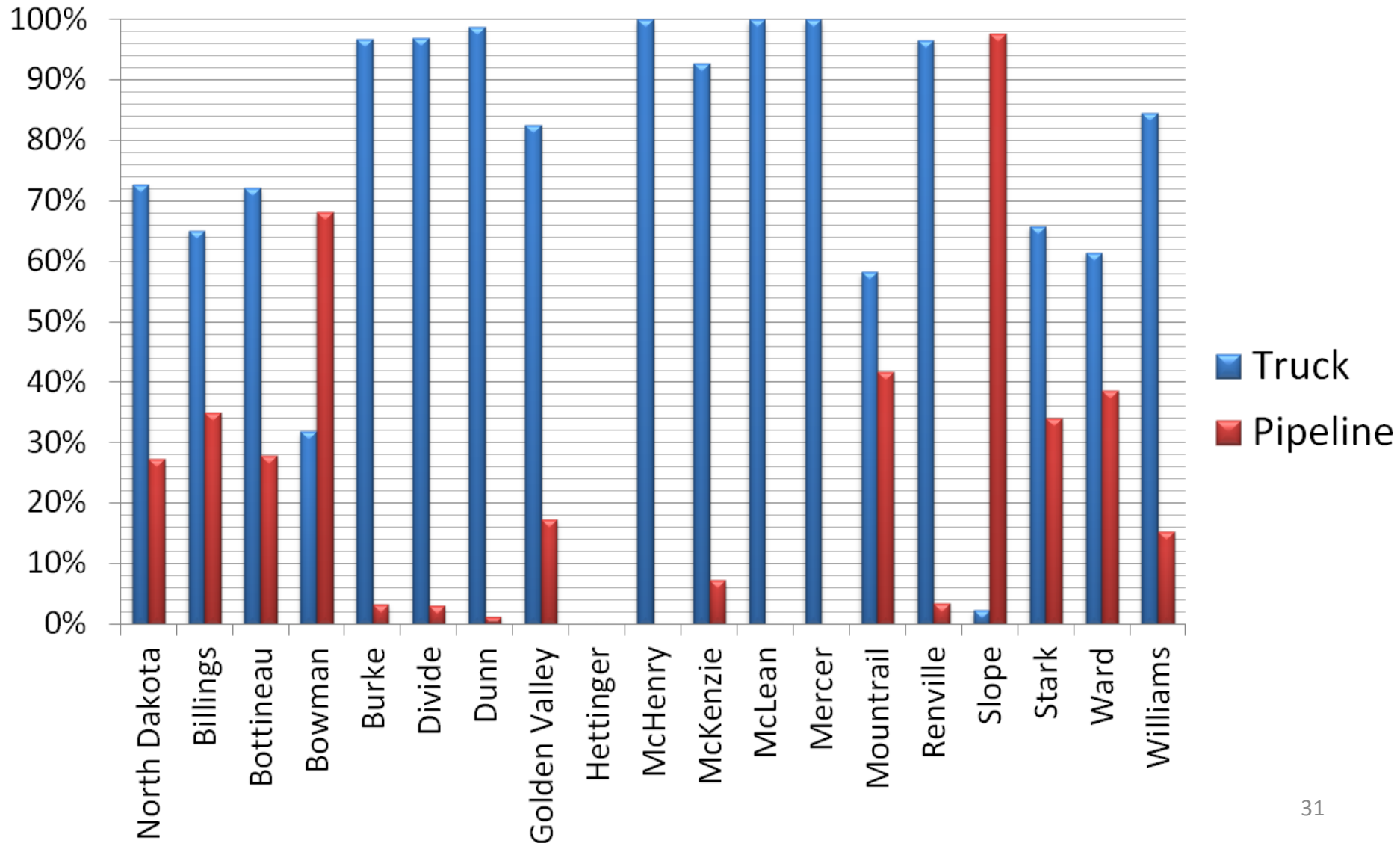


*Modified from Bridger and Belle Fourche Pipelines

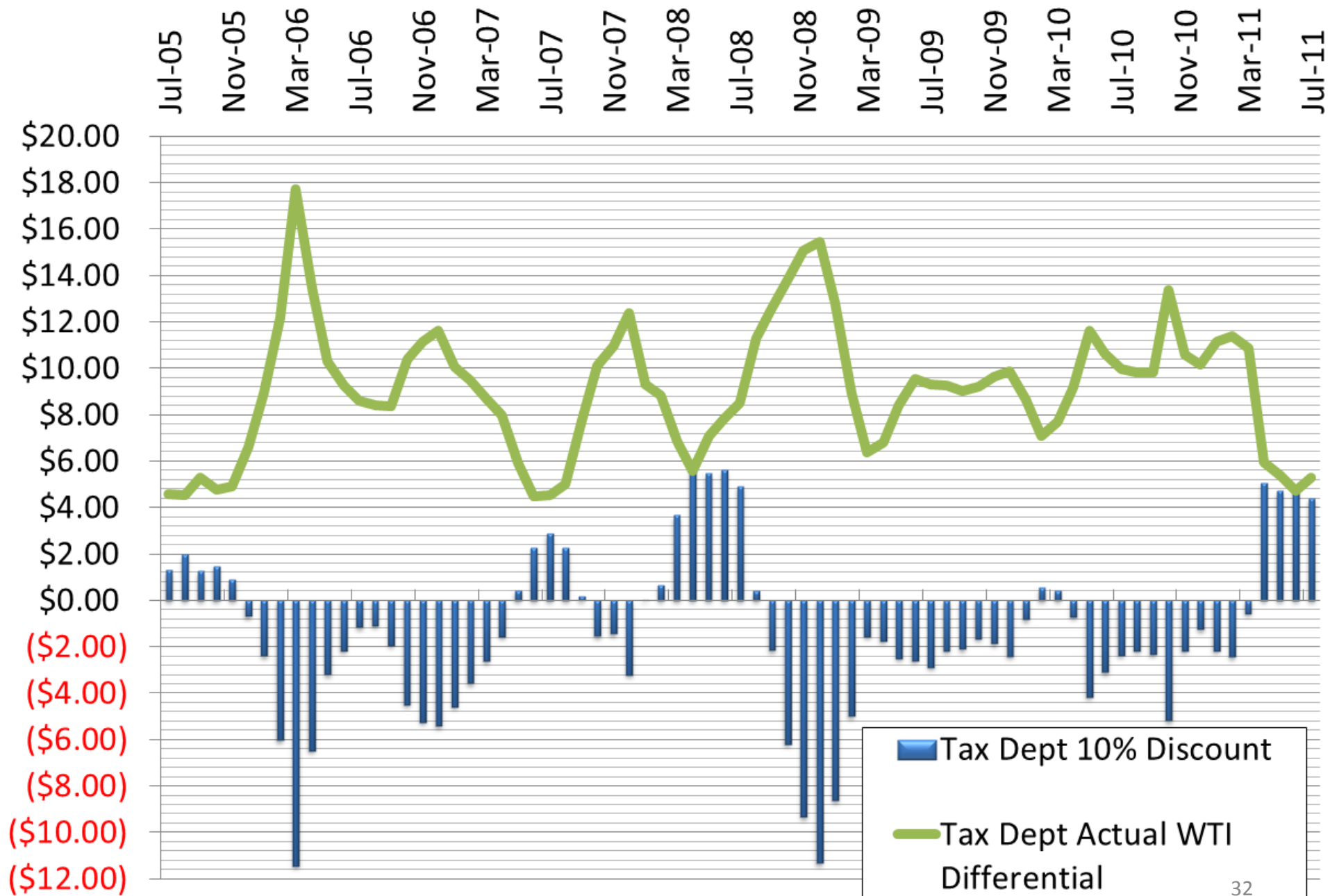
North Dakota Crude Gathering



Crude Gathering By County



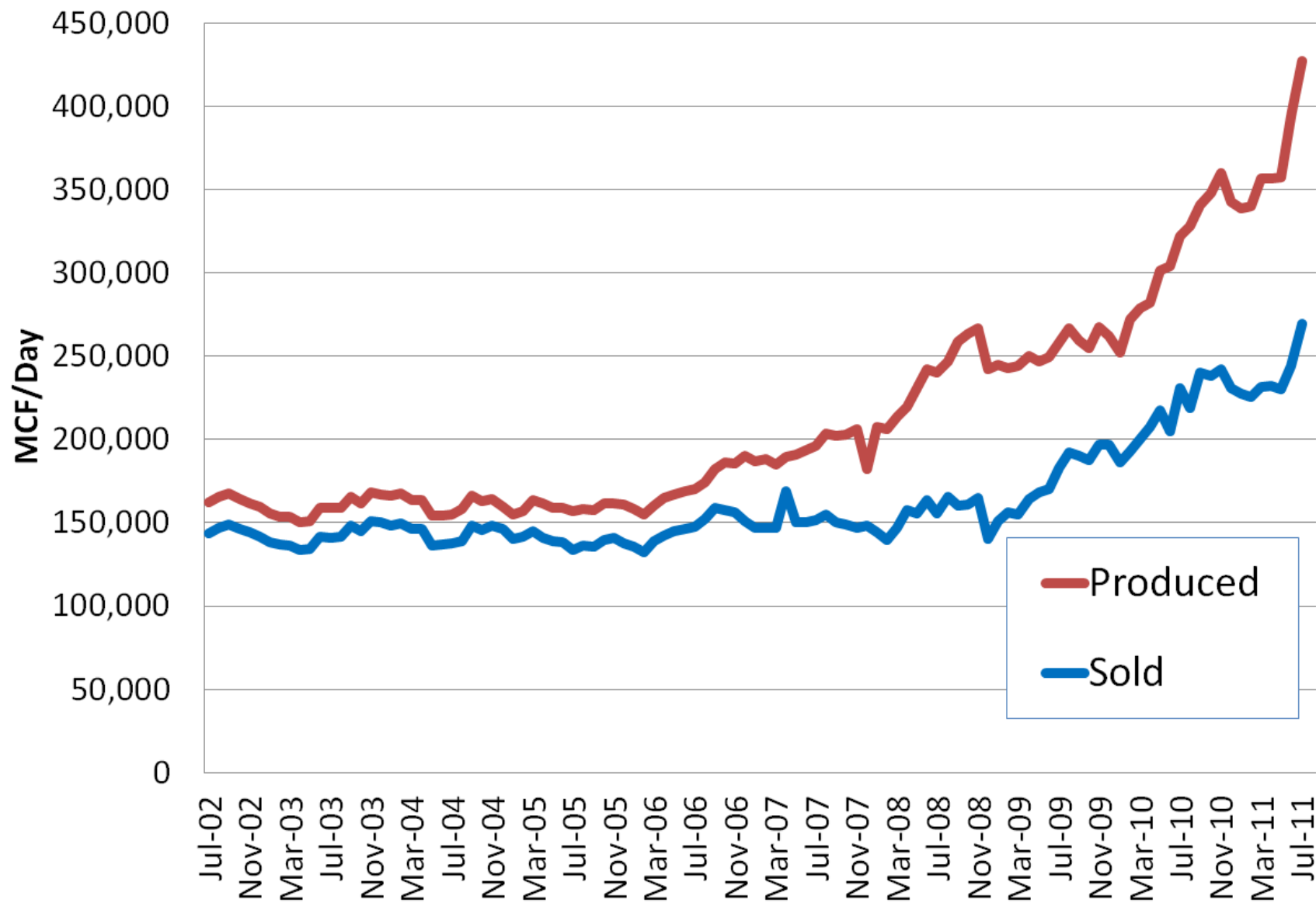
ND Tax Department Average Crude Oil Discounts - 90% NYMEX



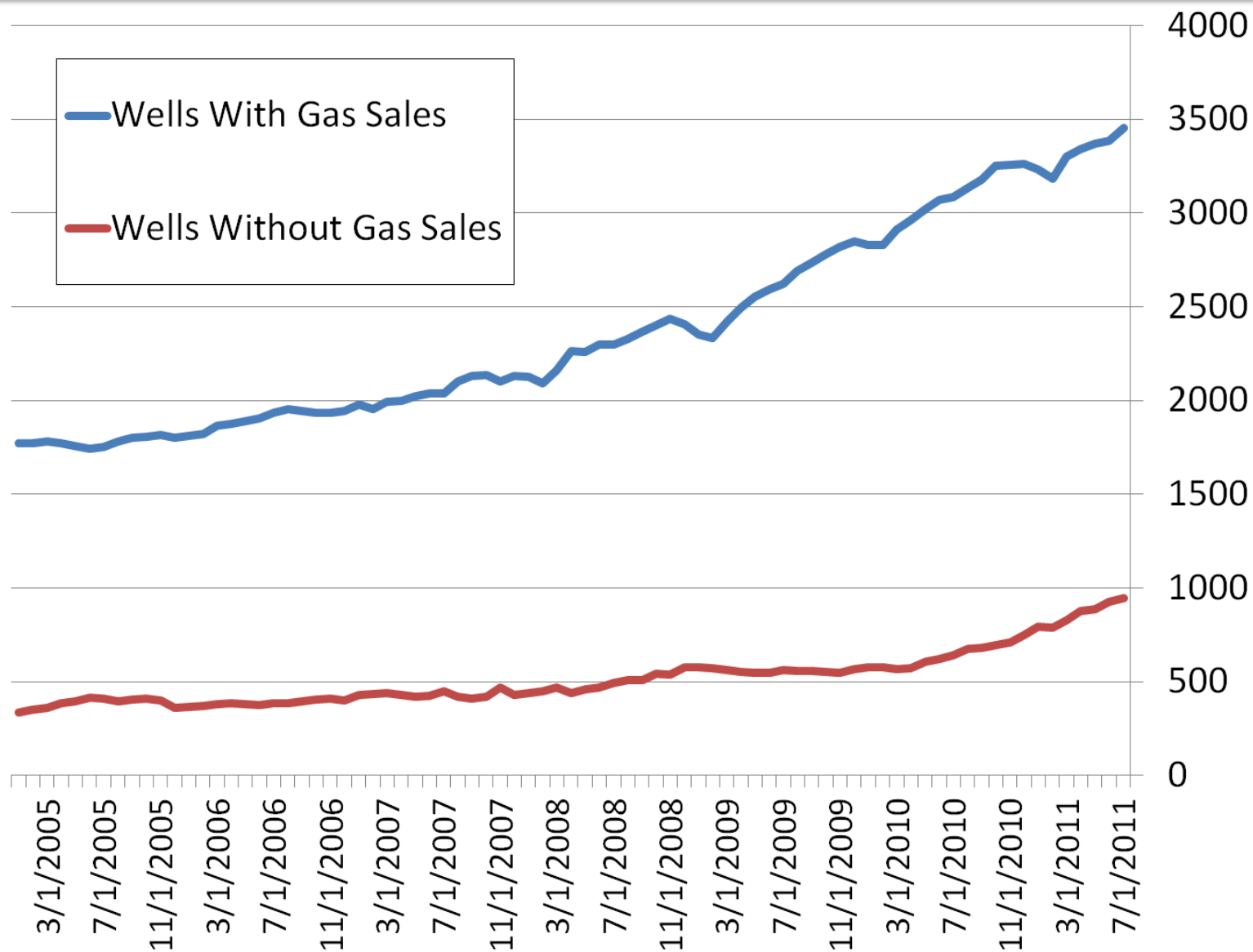
Natural Gas Projects



ND Gas Production

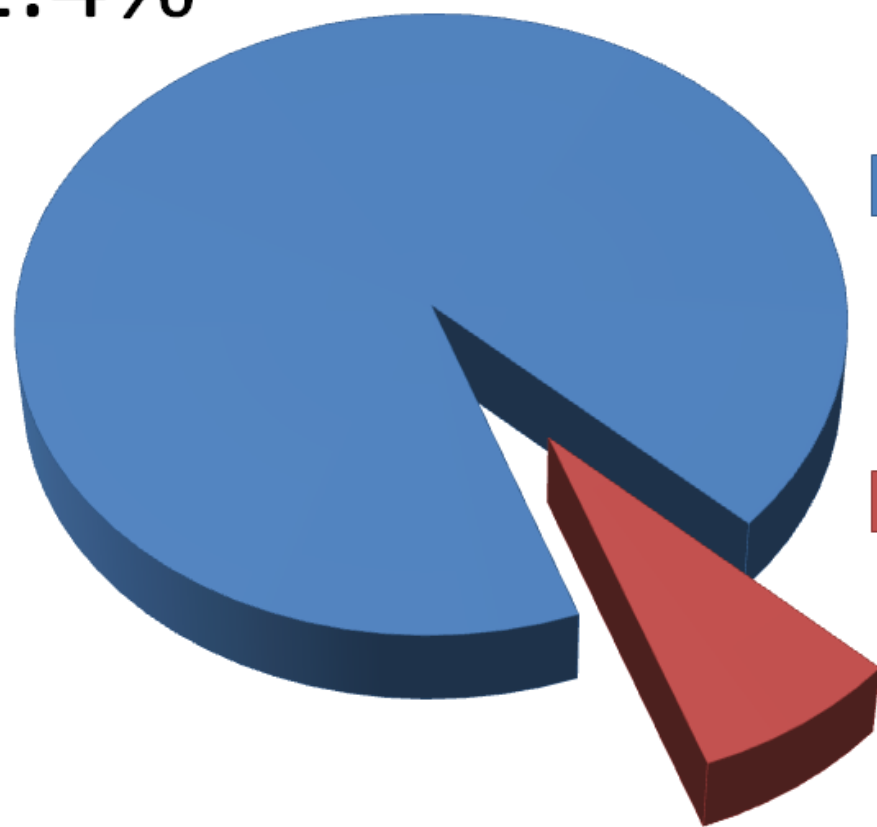


ND Gas Gathering Statistics



ND Oil & Gas Development Efficiency

92.4%



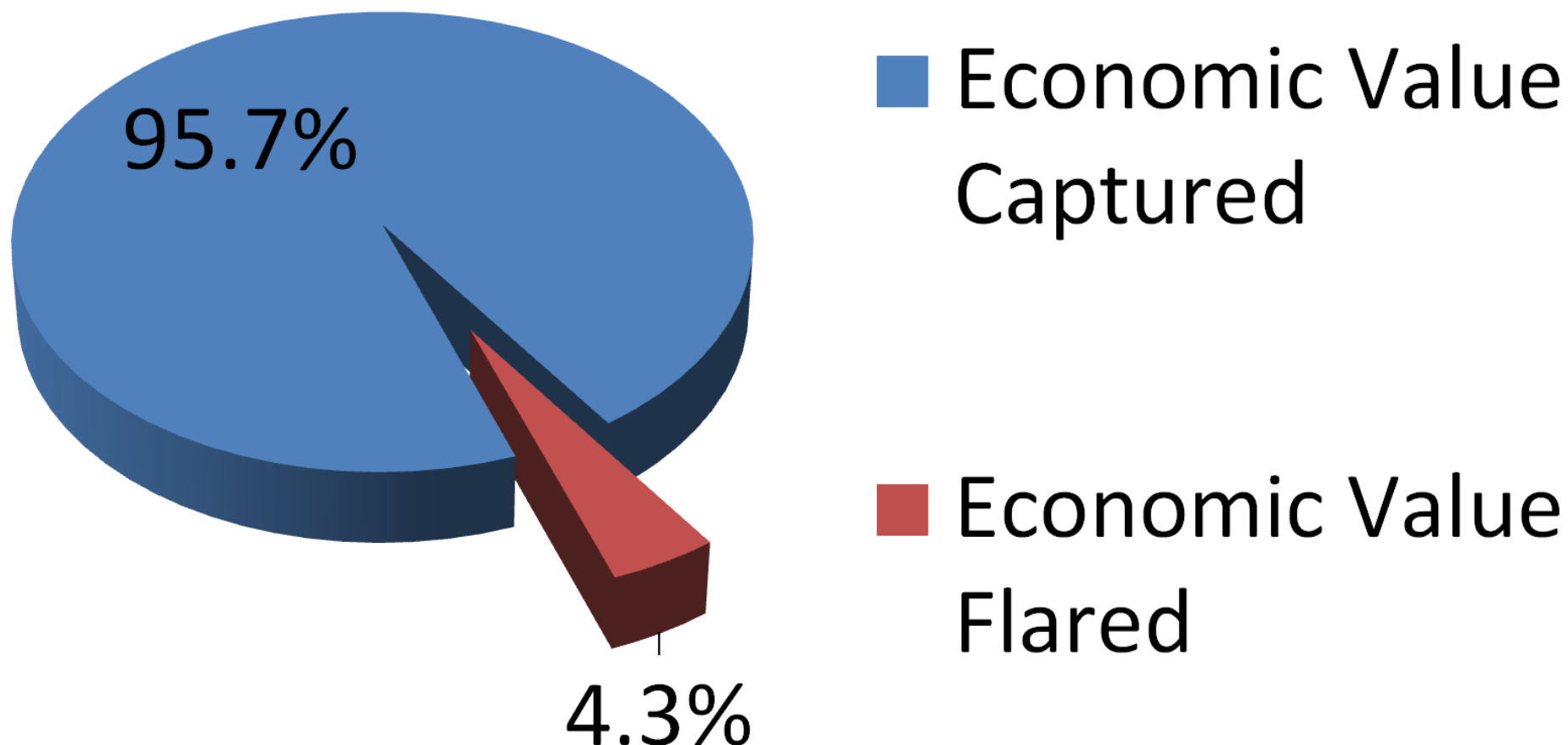
■ BTU's Captured

■ BTU's Flared

7.6%

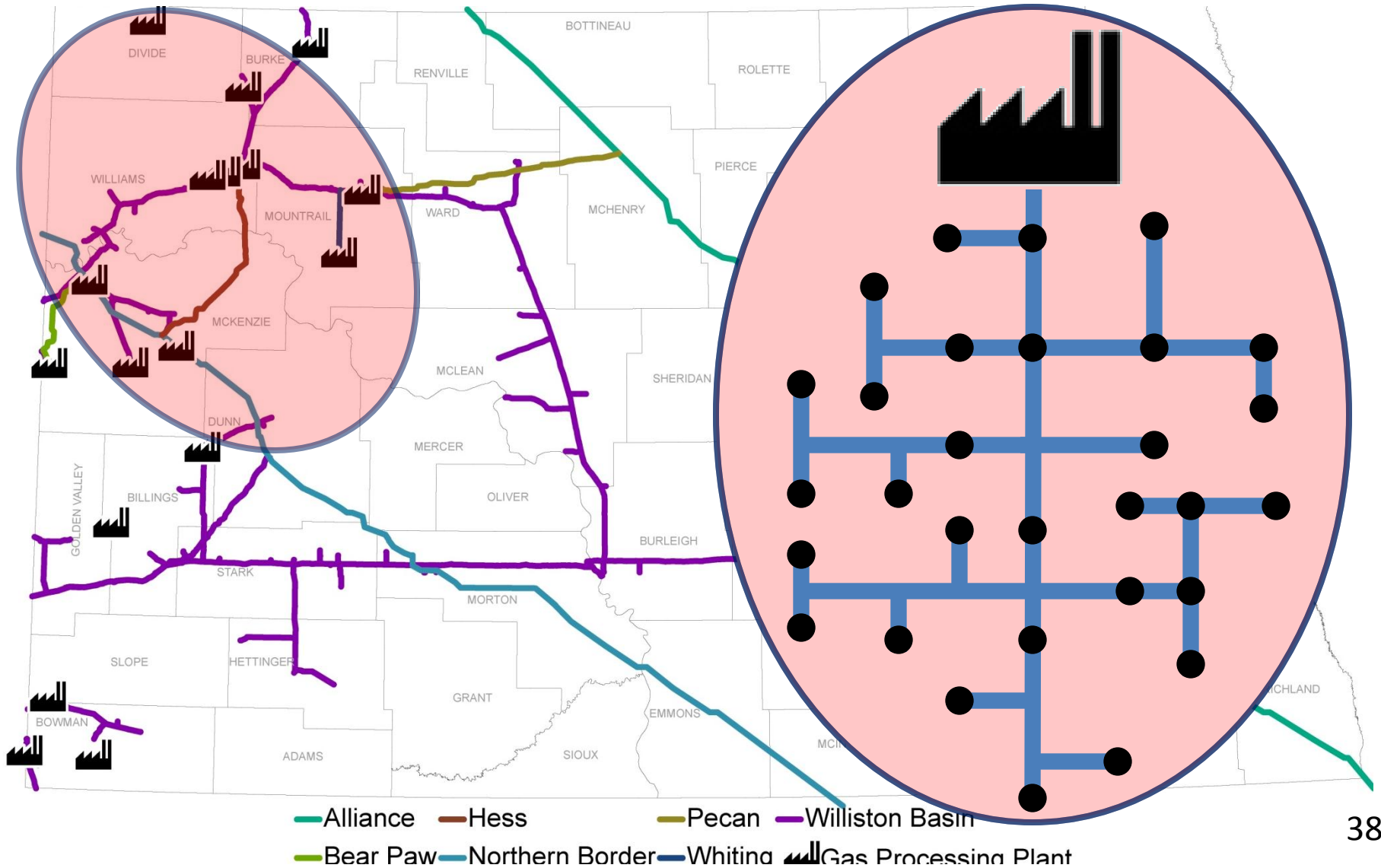
July 2011 Data

ND Oil & Gas Development Efficiency

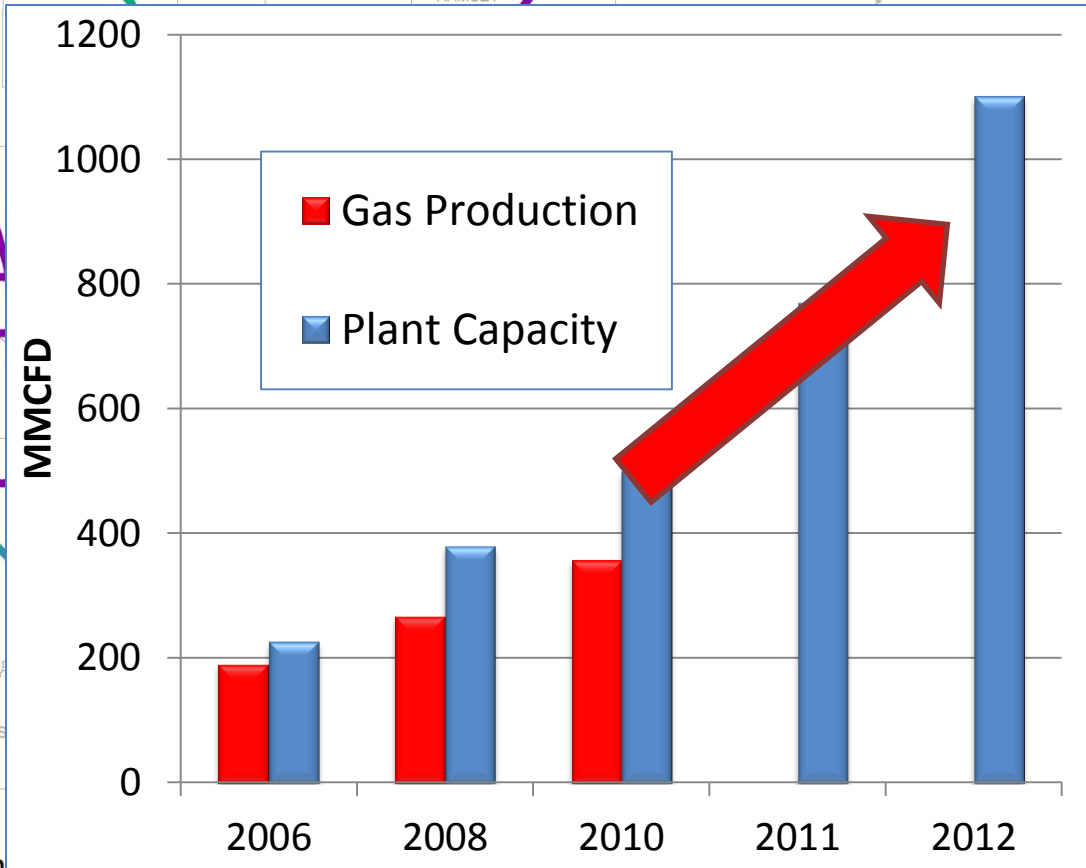
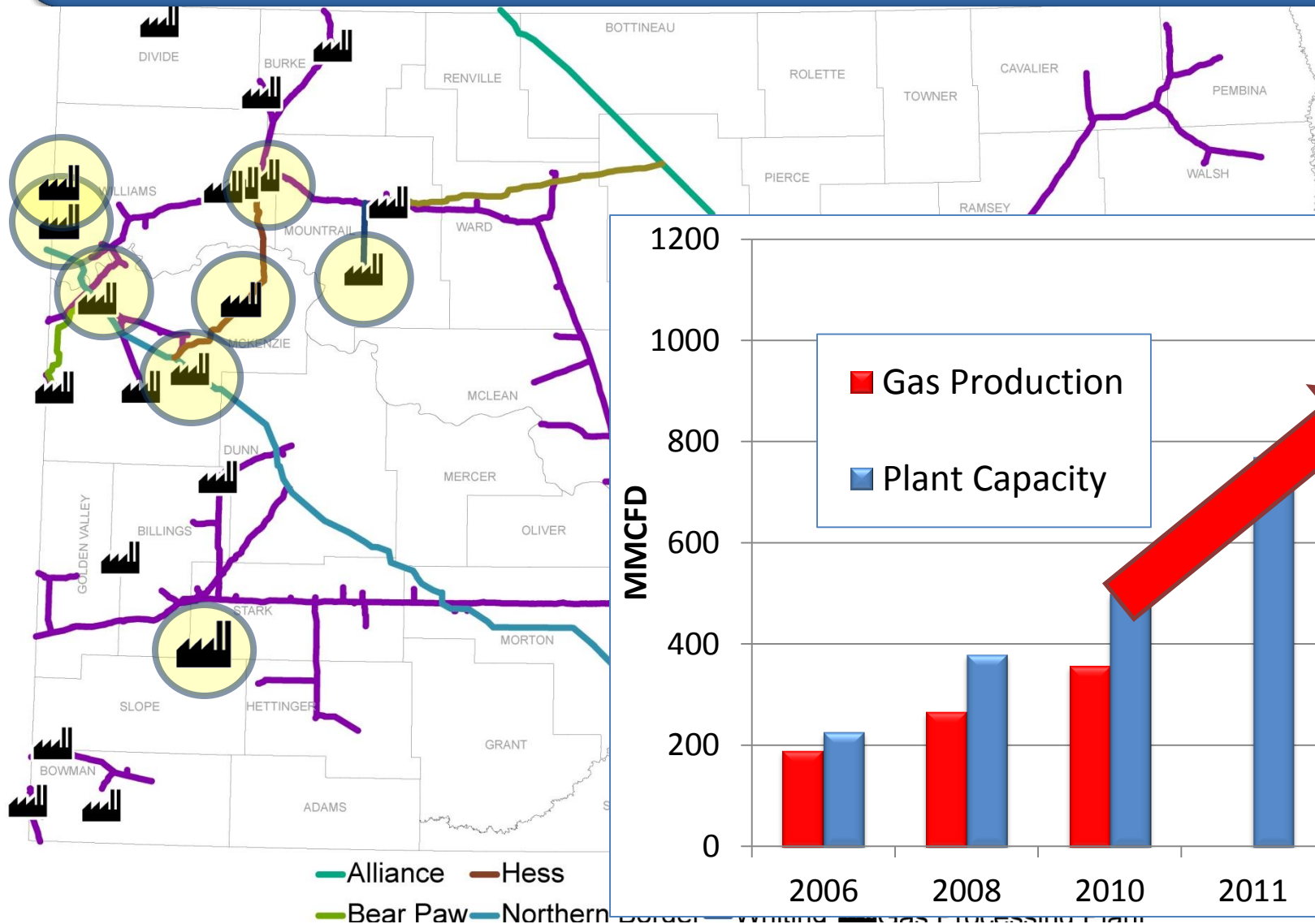


July 2011 Production Data, Oil Price of \$91.79/bbl,
Natural Gas/NGL Wellhead Price of \$12.00/MCF

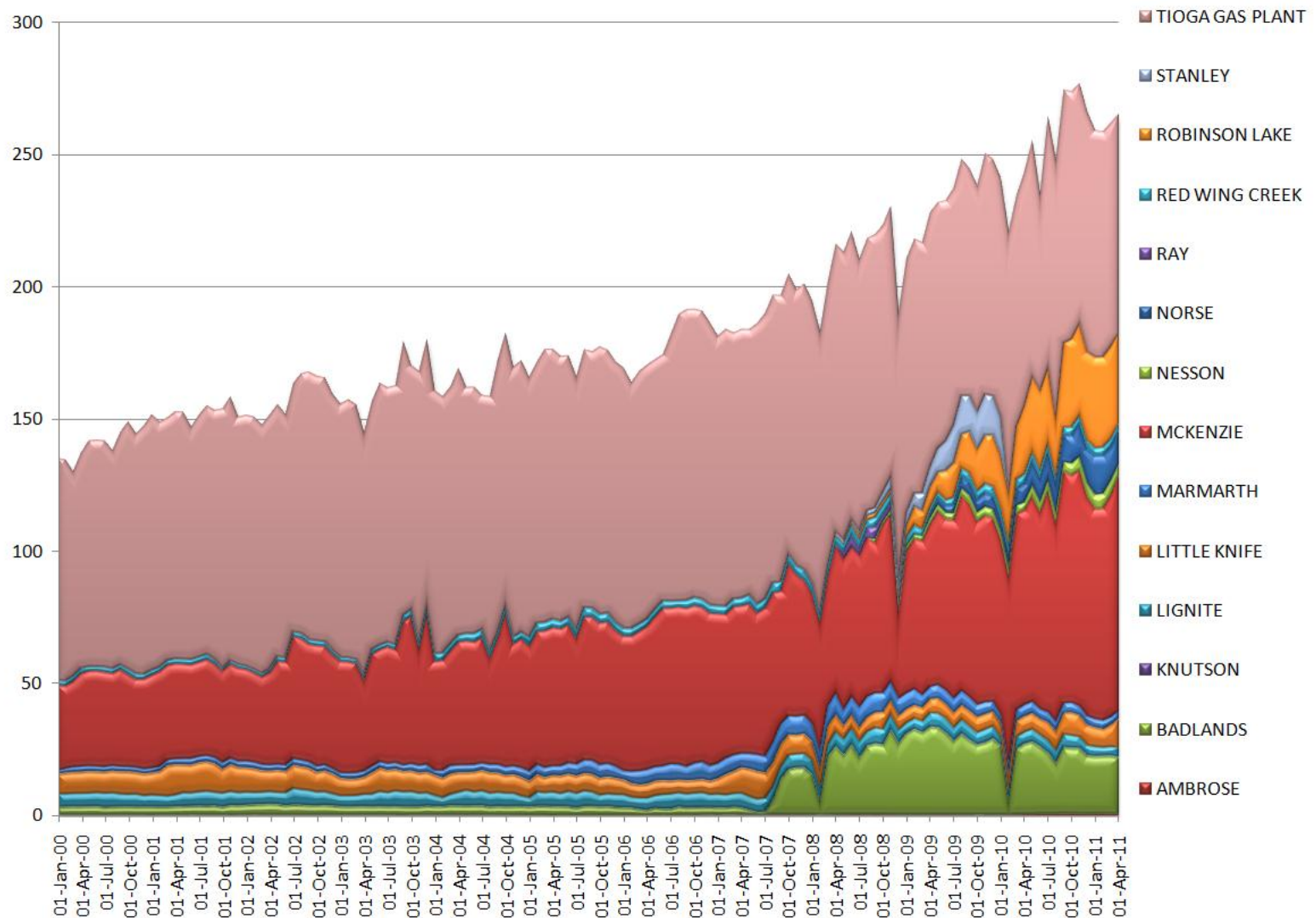
Natural Gas Challenge I

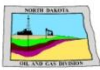


New or Expanding Gas Plants



Natural Gas Plant Intake, MMCFD

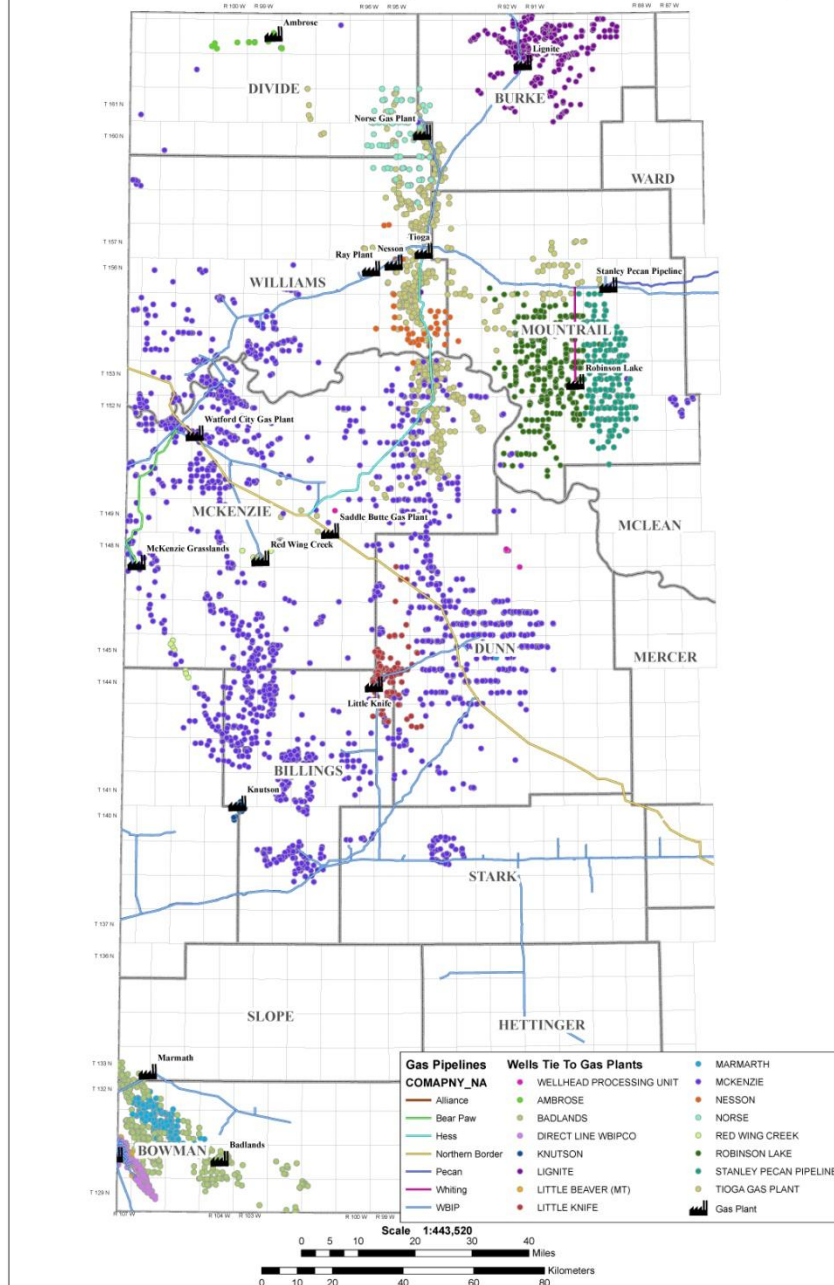




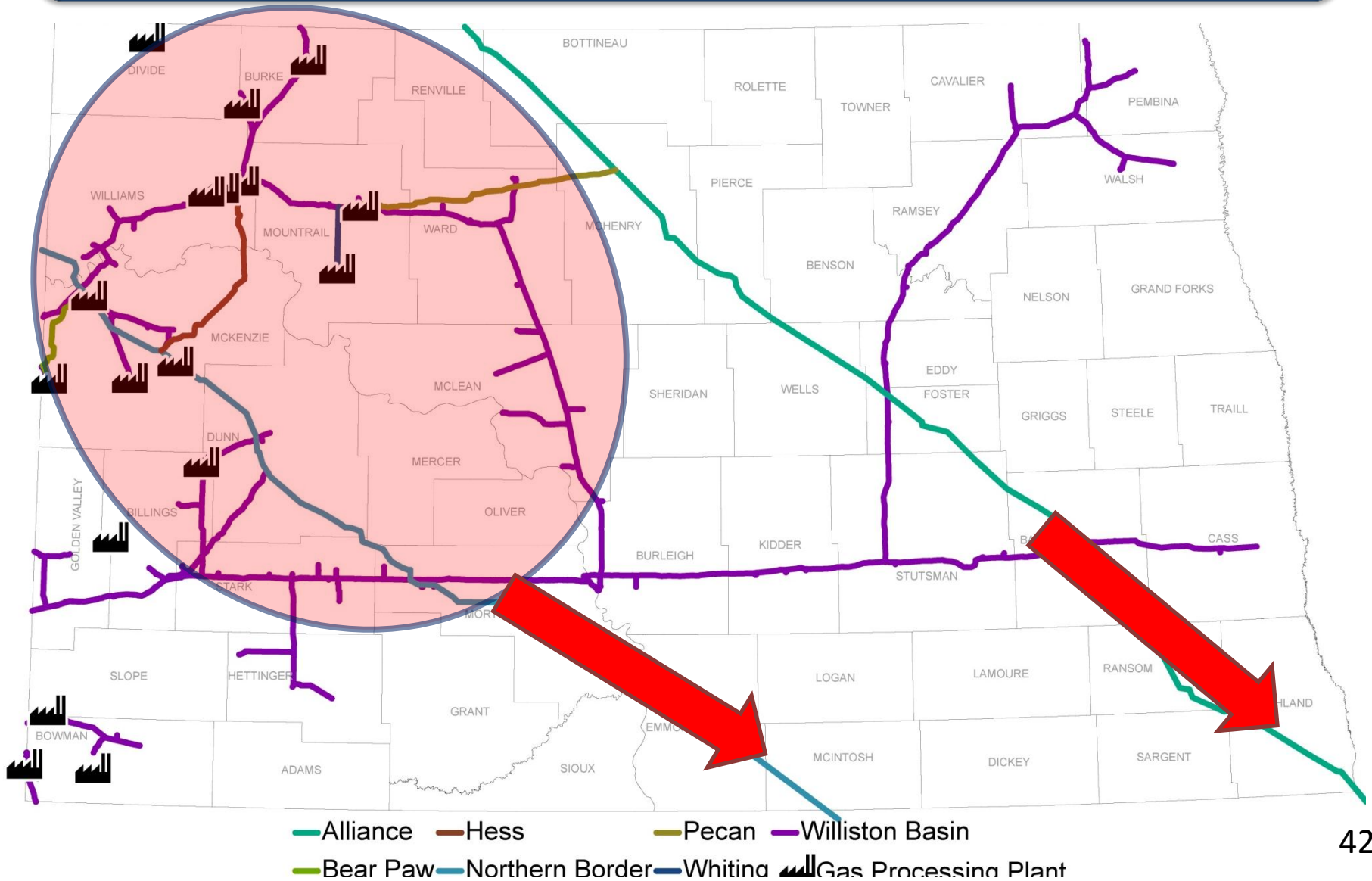
North Dakota Gas Processing and Transportation July, 2011



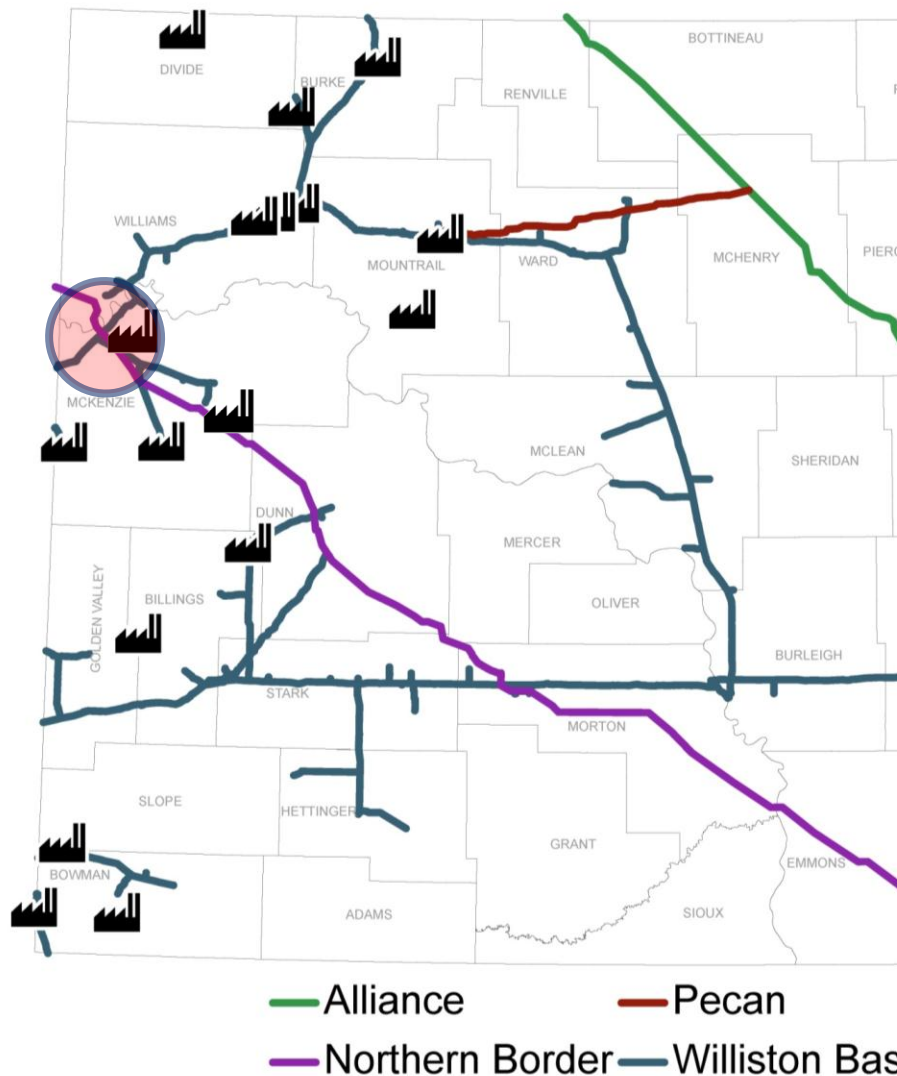
North Dakota Natural Gas Processing and Gathering



Natural Gas Challenge II



Williston Basin Interstate Pipeline



Charbonneau Expansion

32 MMCFD
Added in 2008

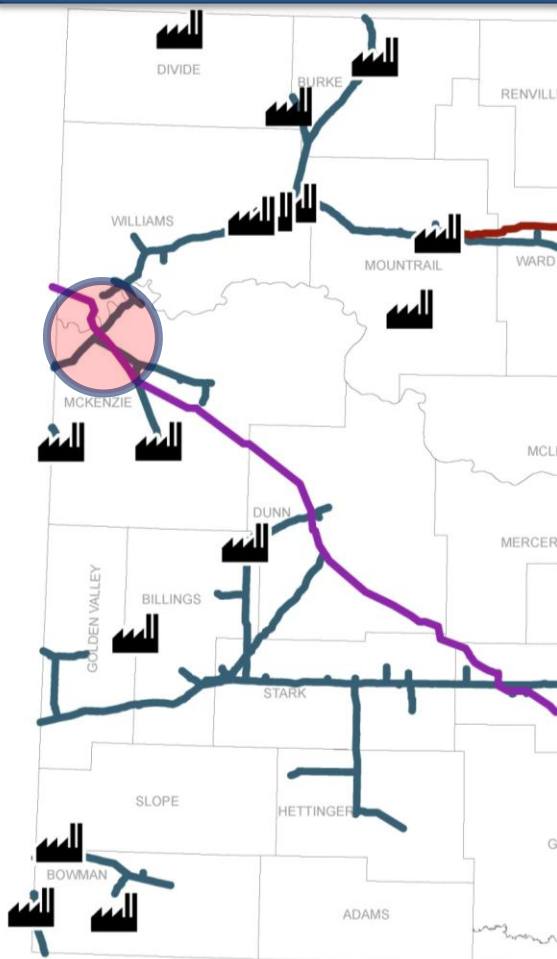
7 MMCFD
Sep 2011

Baker Storage Expansion

April 2012

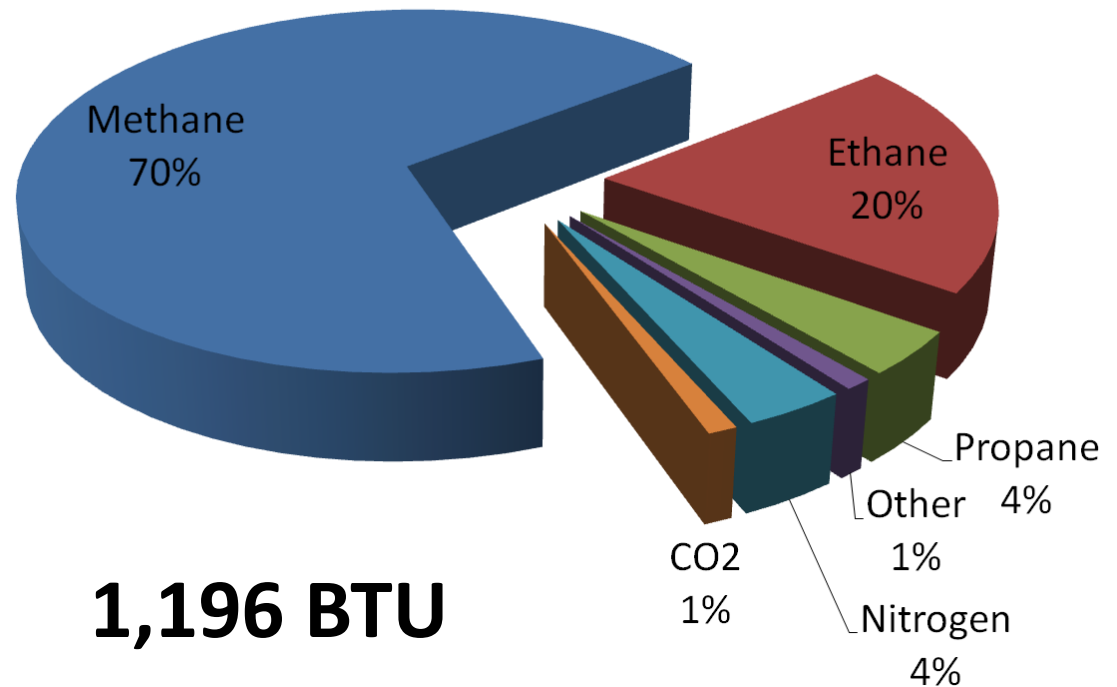
Potential Portal Delivery

Current Ethane Situation

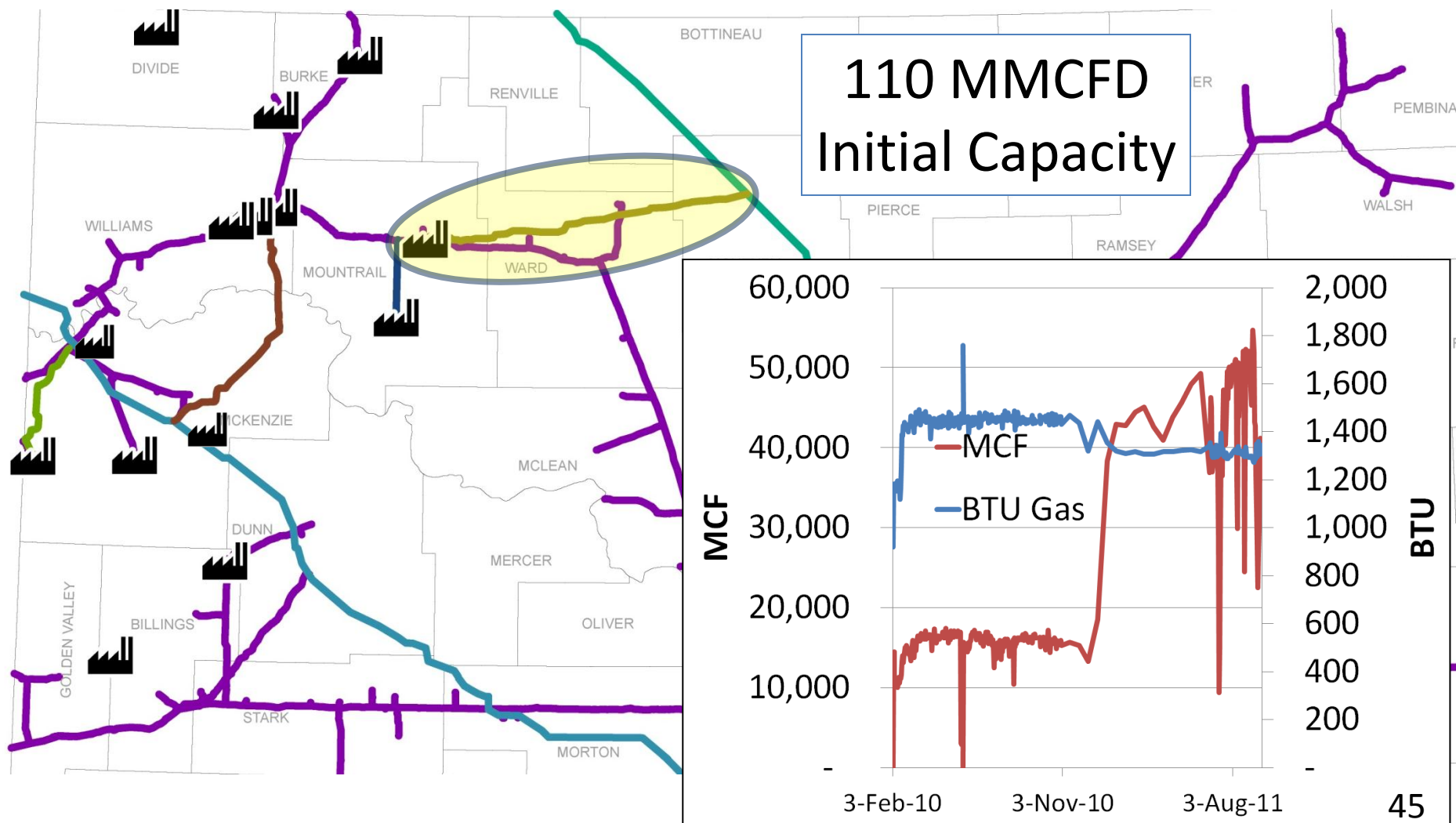


— Alliance
— Northern Border

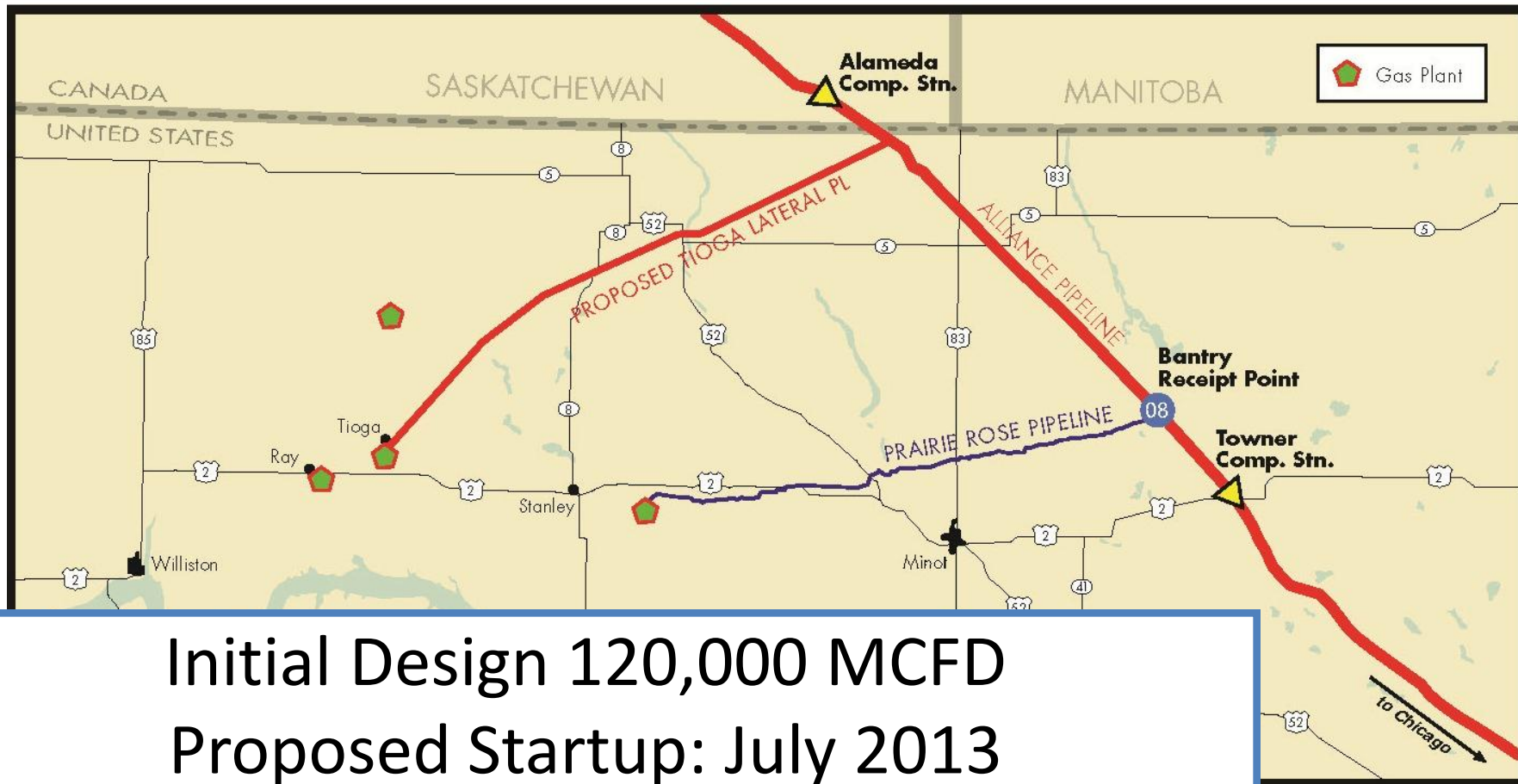
Charbonneau Station



Sable NGL - Prairie Rose Pipeline

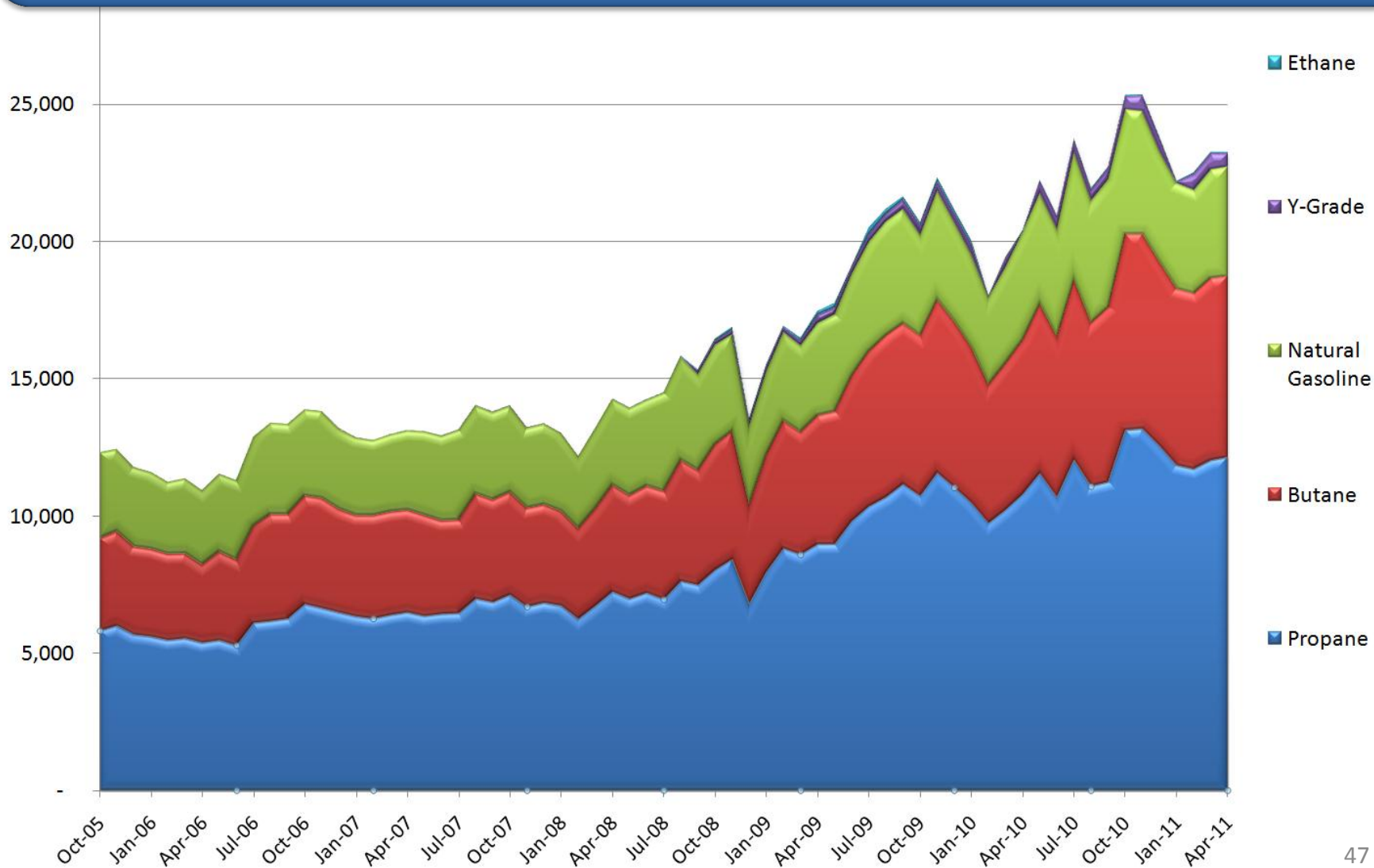


Alliance Tioga Lateral Pipeline



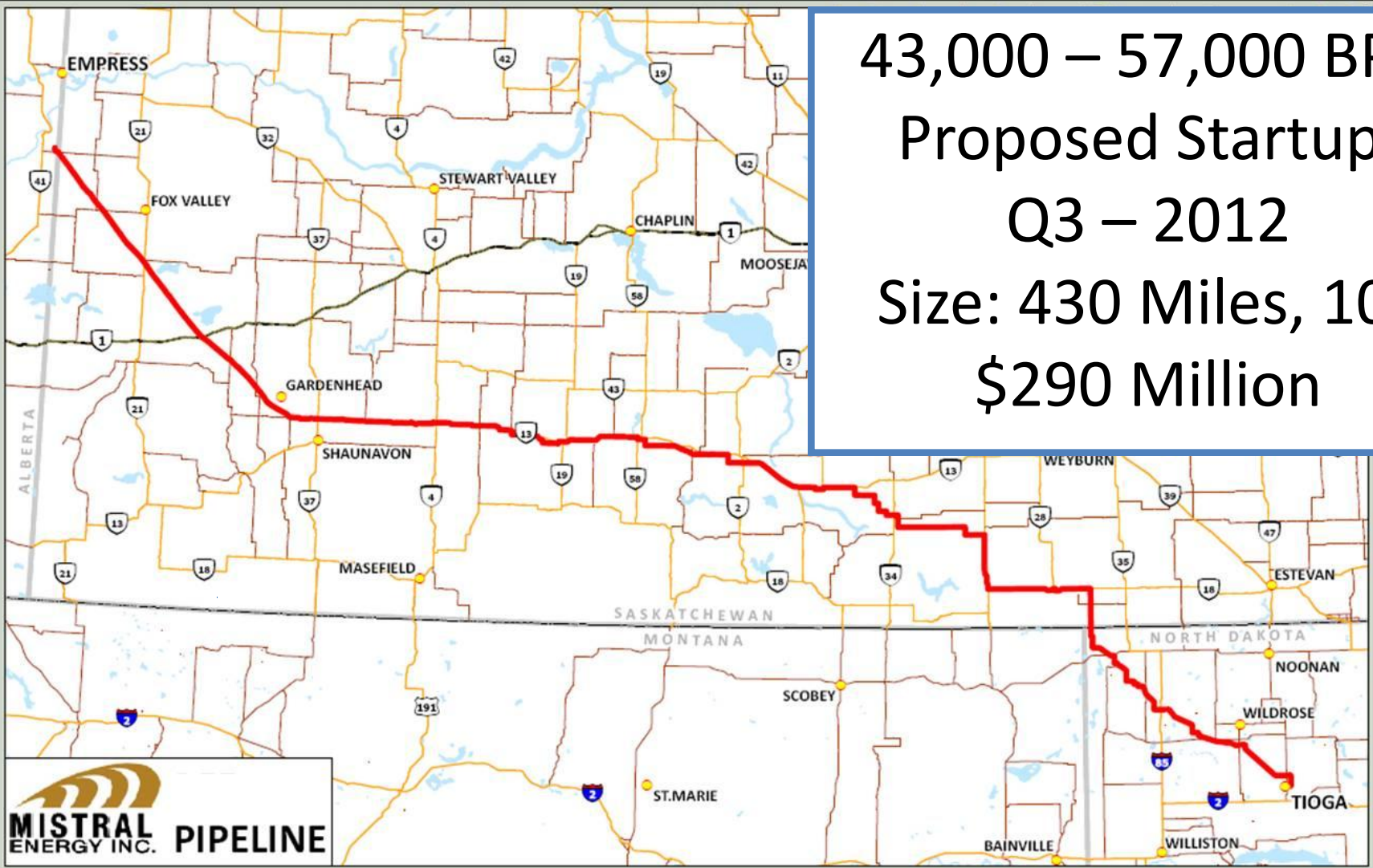
Initial Design 120,000 MCFD
Proposed Startup: July 2013
Size: 80 Miles, 12"-16"

North Dakota Natural Gas Liquids



Vantage Pipeline: Ethane

43,000 – 57,000 BPD
Proposed Startup:
Q3 – 2012
Size: 430 Miles, 10"
\$290 Million



ONEOK Bakken Pipeline: Y-Grade

Proposed Bakken Pipeline

 Bakken Pipeline

 Overland Pass Pipeline

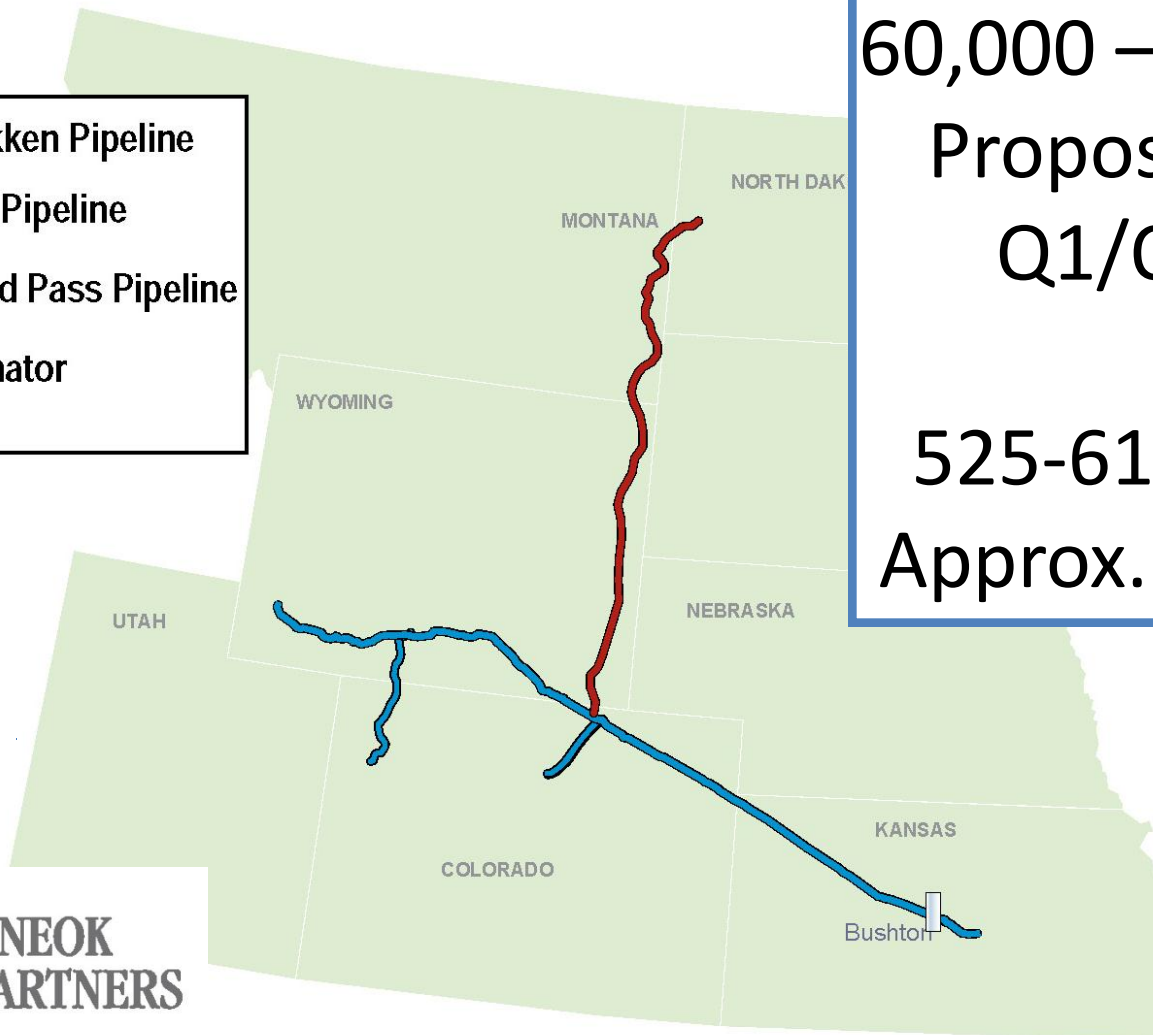
 Fractionator

60,000 – 110,000 BPD

Proposed Startup:
Q1/Q2 – 2013

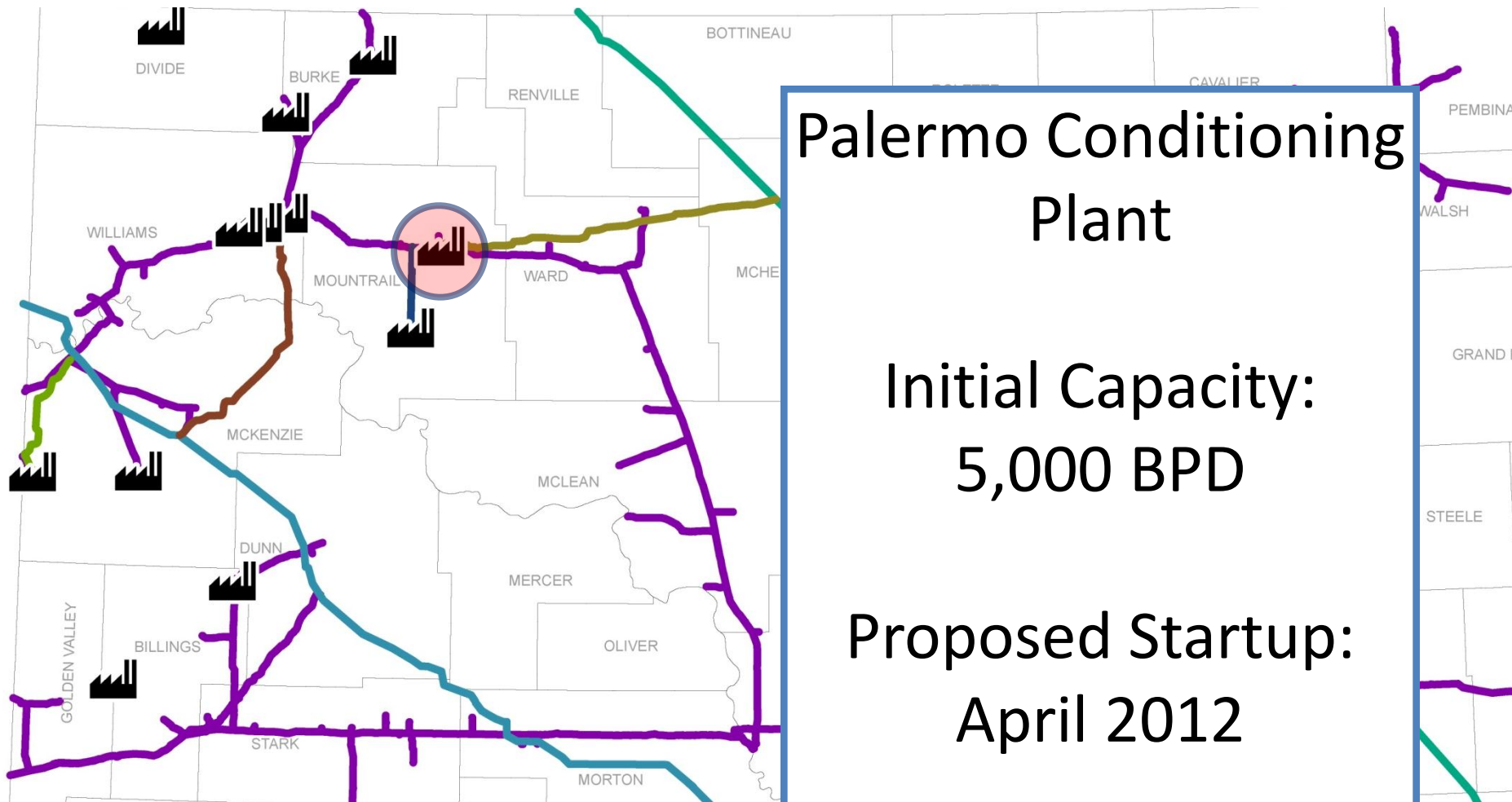
Size:

525-615 Miles, 12"
Approx. \$700 Million



ONEOK
PARTNERS

Sable NGL Truck Unloading



NDPA Webinars

- Past Slides and Video Available Online

- Industry Experts



- New Topics Each Month

- Audience Interaction

Contact Information

North Dakota Pipeline Authority

600 E. Boulevard Ave. Dept. 405
Bismarck, ND 58505-0840

Phone: (701)220-6227

Fax: (701)328-2820

E-mail: jjkringstad@ndpipelines.com

Website:

www.pipeline.nd.gov



Know what's below.
Call before you dig.

